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CITY OF CALGARY

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SUBURBAN RESIDENTIAL GROWTH INFORMATION UPDATE 2004-2008

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FOREWORD: THE CITY'S GROWTH MANAGEMENT INFORMATION PRODUCTS

Calgary's growth-related challenges are significant, but so are the benefits of orderly, well-managed and equitably-financed growth. The City of Calgary is responsible for managing and coordinating the planning and investment needed to accommodate growth.

To assist in this management, The City has developed a research program to analyze growth expectations and coordinate the plans for infrastructure and services to support that growth. One of the products from this work is a series of information documents:

- *Suburban Residential Growth Information Update* (annual);
- *Accommodating Growth: Municipal Capital Investment Framework* (annual); and
- *Industrial Growth Information Update* (annual / semi-annual as required).

Together these documents provide City Council, the Administration, private developers and the public with the base information they need to plan for growth and change. The documents share some common information but each has a specialized focus. The following chart summarizes the content of these documents and shows how the current document, *Suburban Residential Growth Information Update*, fits into the overall package of information.

For business development, investment and site selection inquiries or further information please contact:

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	SUBURBAN RESIDENTIAL GROWTH INFORMATION UPDATE	ACCOMMODATING GROWTH: MUNICIPAL CAPITAL INVESTMENT FRAMEWORK	INDUSTRIAL GROWTH INFORMATION UPDATE
FOCUSES ON:	**Suburban residential development in the last 5 years and the next 5 years**	**City's capital budget plans for suburban residential growth in the next 20 years.**	**Industrial land supply and growth expectations.**
PROVIDES CURRENT INFORMATION ON:	• City approach to managing residential land supply • inventory of suburban residential land supply including: ❑ planning approval status ❑ water and wastewater servicing ❑ plans for future water and wastewater service extensions ❑ transportation improvements • historical suburban residential development activity • current suburban growth dynamics • method of forecasting growth locations	• City approach to managing residential land supply • Overview of financing infrastructure required for growth • City's overall capital budget • Budget and location of all City capital projects related to growth from the current City budget • Operational framework and the process followed to plan for new development	• City approach to managing industrial land supply • Inventory of industrial land supply including: ❑ planning approval status ❑ water and wastewater servicing ❑ plans for future water and wastewater service extensions • Current industrial development activity • Listing of planned City growth related transportation projects. • Recommendations for industrial policy studies and research.
OUTLINES FUTURE EXPECTATIONS FOR:	• 5-year population and housing forecasts by city sector • the balance between existing serviced land supply and the expected demand.	• 5, 10, 15 and 20 year population and housing forecasts by city sector • City capital expenditures related to growth for the next 5, 10 year and beyond (where possible) by area of operation and city sector	• 5 year forecast of industrial employment by industrial area • related land demand estimates

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CONTEXT FOR THE SUBURBAN RESIDENTIAL GROWTH INFORMATION UPDATE

The *Short-Term Growth Management Strategy* (STGMS) was adopted by Council in 1985, to assist in accommodating growth while avoiding the premature investment in some municipal infrastructure (water, wastewater and drainage). The *Update* document and the information contained within help guide the extension of services into areas where it is most appropriate to grow from the dual objective of efficiently managing City investment and maintaining enough serviced land to support a competitive housing market.

1 INTRODUCTION

The purpose of this report is to examine, on an annual basis, the expected fit between residential land demand and supply over the coming five-year period. The intent is to identify whether a sufficient supply of readily developable land exists, in a variety of locations, to facilitate competitive land and housing markets.

The land development and house-building industries attempt to be as responsive as possible to changes in the marketplace. The amount of housing constructed, the location of development activity and the types of housing will vary with changing rates of population growth, consumer preferences, interest rates, house prices, expectations for the future and competition in the marketplace.

It is also important to note that this distribution of market expectations reflects the unique circumstances in each sector with respect to the availability of land and infrastructure (serviced land) as well as the ownership of developable land in any given sector. The timing and scale of servicing and subdivision expectations may be more directly affected by marketing strategies of individual developers which can affect the amount of housing constructed in a given sector.

As a result, the transition of "raw" land (i.e., vacant or in agricultural use) to fully serviced, subdivided, "ready-to-build-on" lots involves a good deal of uncertainty. **The amount of development in any given year is not certain, nor is its distribution among various builders, developers and communities.**

Within this changing environment, The City is called upon to provide utilities and transportation services to enable the "bringing on-stream" of new lands for development. The timing of expenditures for sewers, water and other utilities must occur prior to housing construction. Some transportation facilities may be needed to provide initial access to new development; other facilities may be provided later, as areas develop. The City must also plan for and provide a wide range of other municipal facilities and services to new communities as they grow.

The challenge facing the City then is to be prudent in avoiding the premature extension of costly utilities and services while making every effort to support a competitive, efficient land development process. This ongoing "balancing" occurs in several forums at the same time (e.g., planning and subdivision approvals, budgeting processes, utility construction scheduling). To assist this balancing process, a shared view of the next five years is necessary.

This report is designed to provide an accurate description of recent suburban residential development inventory and activity in Calgary and to forecast demand for the 2004 - 2008 period. **The report does not contain policy recommendations or explicit budget priorities** - its contribution lies in providing a solid, comprehensive information base to support planning, development and budgeting decisions for utilities in the short-term.

The annual updates to this report include:

- inventory of the residential land supply by sector in the suburban areas of Calgary,
- review current development activity around the city, sector and community,
- forecast housing and residential land supply,
- assess the balance between existing serviced land supply and the expected demand; and
- recommend the timing of service extensions in specific sectors

This methodology provides:

- a common information base,
- a detailed and yearly analysis of suburban growth dynamics, and
- a framework to evaluate requests for new service extensions.

The methodology employed in the annual updates is a "market-driven" methodology and only deals with the timing of delivery of water, wastewater and drainage infrastructure in the five-year horizon. It does not address the capital costs of service extensions.

2. HOW TO USE THIS INFORMATION

The Suburban Residential Growth Information Update assesses Calgary's past and current suburban residential land inventory as well as expected supply/ demand conditions for the coming five-year period (2004 -2008). This information is updated annually, in accordance with the Short-Term Growth Management Strategy, as approved by Council in February 1985.

All forecasts are projections to April of each year to coincide with the annual civic census compiled April of each year. This means that the housing and population forecasts represent what is required for April 2004, April 2005, April 2006, April 2007 and April 2008. In addition the inventory of supply is also based upon the conditions at the time of the civic census to utilize civic census housing and population numbers in relation to the remaining land supply. This allows for an analysis of the existing condition to remaining capacity, which in any particular area or community provides a starting point to build out the vacant land supply. This is done using city forecasts provided by the Land Use Planning & Policy Division of The City of Calgary.

The report is intended to be used in two ways:

- **Provide a common information base and set of forecasts (related to the next 5 years' growth) to support facilities planning and budgeting by civic departments.**
- **Provide the Growth Management Technical Team with a detailed and yearly analysis of suburban growth dynamics, providing a framework in which to evaluate the merits of individual requests for new service extensions in suburban areas.**

The report does not intend to be used as a benchmark for determining, specifically, where development in the City is most appropriate. Nor is this report to be referenced as the sole source in determining what land may be subject for development. This determination will be evaluated by applicants and The City who will assess the variables of development. This document is not intended to restrict, inhibit or prescribe the location of new development, but instead it is intended to aid in both the City's and the development industry's efforts to accommodate the demand for homes necessary to respond to the growth currently being experienced in Calgary.

Appendix I provides a detailed look at historical information and future estimates on residential growth in the form of figures and maps.

Appendix II of this report also provides an overview of residential growth areas on a sector by sector basis.

In preparing this report, the team consults with representatives of the Urban Development Institute and the Calgary Region Home Builders' Association.

3 THE CALGARY MARKET

The purpose of this report is to examine the expected fit between residential land supply and over the coming five year period (2004 - 2008). The City's Land Use Planning & Policy Division on an annual basis provide housing and population forecasts for Calgary. This annual forecast and related economic information is provided in a published document called **"Calgary and Region: Socio-Economic Outlook 2003-2008,"** published in October/November of each year. Of this citywide forecast the housing and population is further allocated into the developing suburban communities as determined through this report.

The intent is to ensure that there exists a sufficient supply of readily developable land, in a variety of locations, to facilitate competitive land and housing markets, while avoiding premature municipal investment in utilities and services.

It is recognized that supply and demand conditions are in a constant state of flux and that it is important to monitor changes on an ongoing basis and to review circumstances annually. It is also recognized that the information provided in this report is relevant at the time of preparation and changing forecasts, demand, and capacity are continually impacting the information provided within.

On the basis of the information and analysis in this report, the following conclusions are presented.

3.1 Economic Outlook 2004 - 2008

Calgary's overall economic prospects for the coming five-year period were reviewed by The City's Land Use Planning & Policy Division in the Fall of 2003. Information used in this residential update is based upon information from the report **"Calgary and Region: Socio-Economic Outlook 2003-2008."** Some of the conclusions of this analysis are summarized below.

The Calgary Economic Region, which includes Calgary and surrounding communities, will experience will experience slightly higher population growth levels than the city of Calgary over the next five years. **Calgary's population is expected to continue to grow over the next five years, although at a slower rate than the previous five years.** This is due largely to reduced net migration. Following several years of strong growth, Calgary's population growth, labour market, and economy in general will stabilize at more modest rates. A relatively low unemployment rate compared to the rest of the country has resulted in strong net-migration and population growth has contributed to a booming real estate market in past years.

FIVE-YEAR FORECAST FOR THE CALGARY ECONOMY

MEASURES	2004	2005	2006	2007	2008
City of Calgary Population	942,000	960,000	979,000	997,000	1,016,000
Annual Population Growth	19,685	18,000	19,000	18,000	19,000
Total Population Growth %	2.0	2.0	1.9	1.8	1.8
Net Migration	10,000	10,000	10,000	10,000	10,000
Housing Growth (Total Units)	9,100	9,100	9,000	8,900	8,900
Single & Semi-Detached	6,800	6,300	6,300	6,200	6,200
Multi Units (Apartment & Row)	2,300	2,800	2,700	2,700	2,700
Total Employment	526,000	538,000	549,000	560,000	573,000
Total Employment Growth %	2.7	2.3	2.1	2.0	2.2
Calgary Economic Region					
Gross Domestic Product %	3.7	3.6	3.3	3.3	3.4
Unemployment Rate %	4.9	4.9	5.0	4.9	4.9
"CER" Population	1,121,000	1,147,000	1,173,000	1,200,000	1,226,000
"CER" Population Growth %	2.3	2.3	2.2	2.2	2.2

Source: Calgary and Region Socio-Economic Outlook 2003-2008; "CER" Calgary Economic Region

3.2 Population 2004 - 2008

Calgary's population growth during the late 1990's and early 2000 surpassed the growth of most major Canadian centres. Compared to an average annual growth rate of 3.1 percent over the 1998-2002 period the new trend shows a slower population growth, at 1.9 percent annually over the forecast period to a city population of 1,016,000. The Calgary Economic Region is expected to grow at a 2.2 percent annual rate.

Calgary's population grew from 904,987 in April 2002 to 922,315 in April 2003, an increase of 17,328 people, or approximately 1.9%.

Net migration fell to 9,293 in 2003, down from 20,962 in 2002. Despite this dramatic decline, net migration still remained the major contributor to population growth. This sharp reduction in net migration is largely explained by the rise in the local unemployment rate relative to the national rate. As a result, the local economy became a less attractive destination for job seekers from the rest of Canada.

The natural increase, (births less deaths) rose to 8,363 in 2003 from 7,506 in 2002. The year 2003 saw the third year in a row that the natural increase has grown above the five-year average. This above average natural increase can be directly attributed to the positive net migration since individuals who migrate are in the childbearing age cohorts and therefore contribute to natural increase in population.

Over the next five years, Calgary's population is expected to increase by an average of approximately 19,740 people per year, for a total increase of approximately 93,700 people by the year 2008. Net migration is expected to range between 9,700 - 10,300 over the forecast period. Natural growth should slightly increase from 8,400 in 2003 over the forecast period.

3.3 Housing 2004 - 2008

Housing starts in Calgary totalled 11,877 in 2003 slightly down from the 12,362 in 2002. The majority of the units were single unit (7,300) and semi-detached (608) representing 66 percent of the total units in 2003. Multi-unit construction represented the other 34 percent adding 1,092 townhouse (row housing) and 2,877 apartments for a total of 3,969 units. Total housing starts on average between 1999 and 2003 represented 10,600 units per year of which 8,322 (78%) went into the developing suburbs.

Lower levels of net migration, employment levels, household formation rates and reduced pent-up demand, point to a slowing in construction activity in the housing sector over the next five years.

Demand for new housing (single and multi) **city wide** is expected to average at 9,000 units per year, resulting in an increase of approximately 45,000 new units between 2004 and 2008.

The demand for new housing is driven by both increases in the number of households (e.g., an increasing population and/or changes in its composition) and changes in consumer housing needs/preferences (e.g., consumers choosing a newer or larger house). The make-up of the population creating a demand for housing at any point in time will affect the level of demand in particular sectors of the city, as some areas have traditionally served specific market segments.

The focus of this report is on the demand for new housing units in the new suburban communities of Calgary (Map 2). **Communities are considered developing as long as there is significant vacant residential land remaining for housing and population growth. This information is based upon the timeframe of the Civic Census collected yearly every April. As such the inventory of remaining land capacity is also collected and compiled every April.** Communities that are considered developing change year to year as communities start and complete (Figure 38 and Map 9).

The demand for new housing drives the demand for most new subdivisions. This new subdivision, in turn, creates a need to extend and upgrade municipal infrastructure. As a result, the manner in which housing demand is distributed

among the various sectors of the city affects the need for and timing of substantial expenditures by The City to service new growth areas.

While most housing growth is occurring in new suburban areas, a small proportion (5%-10% of the total new single and semi detached starts and 40% - 60% of apartment and townhousing) is located in existing, developed neighbourhoods depending on the individual year.

This occurs through infill/redevelopment in older inner-city community's i.e., Garrison Woods, as well as construction on vacant lands remaining in various locations throughout the city (The distribution of the 2003 building permit applications is illustrated in Map 5 and 6). The location, housing type, numbers and percentage is monitored yearly and is used as a rough template to assign the proportion of the growth to the developing communities. For example, this years report assigns 95% of expected new single and semi detached home construction to go to the new communities. Of the total units forecast, 84% are assumed to go to the developing suburban communities.

3.4 Suburban Residential Requirements 2004-2008

The demand for new housing (single and multi) in **new suburban areas** will likely require approximately 5,500 acres (Figure 38) of land over the next five years, or approximately 1,000 to 1,200 acres per year. This represents approximately 37,800 units (30,230 single and semi-detached units and 7,540 multi-units). Multi-units are considered to be apartment and townhouse. This growth means the city will likely add between 95,000 to 105,000 people to the suburban areas of the city. The amount of single and semi-detached (duplex) that historically goes into the new suburban areas of Calgary ranges between 90% to 95% of the total city new housing market. For the purposes of this report 95% is used.

Multi-unit development in the new suburbs varies quite considerably year to year and has ranged from between 35% to 63% over the last ten years. On average this share has averaged 43% over the last five years and in 2003 it reached 57%. For the purposes of forecasting this report uses an assumption of 54%.

The likely distribution of new suburban growth over the next five years is shown on Map 9 of Appendix I. Map 7 shows the actual suburban residential growth between 1998 and 2003 as it occurred over the last five years.

Caveat:

As with any forecast growth locations should be considered as possible growth directions. Actual locations may and do vary. The colours denote general development patterns of which the specific timing of development is not certain. To keep information as relevant as possible this analysis will be reviewed and updated annually. Finally these forecasts are not intended to control absorption rates or limit choice and competition in the market place.

The City of Calgary is presently in the process of negotiating annexation of new lands in various areas outside of the city's current jurisdictional boundary. If additional lands are annexed over the next year a portion of this growth may shift to other areas presently outside the city's boundary, resulting in changes to servicing, transportation and planning approval considerations. Modifications to the growth allocations and the forecast map may be affected, and will be included in future updates of this report.

In the growth allocations into the developing communities a range of planned densities exist and is used in the allocations on Map 9 Forecasted Suburban Growth using the approved housing mix (approved Land Use) for each area whenever available.

Allocations for residential land are based on building out the five-year population and housing unit forecasts for the suburban areas. The population is assigned to areas based upon the **actual approved land use** and expected housing mix of each plan using the developer's anticipated unit totals when possible. As **such a variety of approved densities are used and a variety of occupancy rates are used** to assign population to these units. Typically areas with higher mixtures of multi unit growth such as Country Hills Village or other significant Multi unit locations requires lower occupancy rates than that of an area of single family developments.

The following chart outlines how densities are calculated.

Density = Number of Units ÷ Gross Residential Area

Sample Density Calculation
(Figures are for sample density calculation only)

A sample community with 259 hectares (640 acres) of total land area, 37 hectares (91 acres) of non-developable lands, 43 hectares (106 acres of regional land uses and 3,029 units (multi unit or single unit), would result in a housing density of 17 units per hectare (7 units per acre).

GROSS TOTAL AREA (total land area of community)		**259 hectares**
Less: Non-Developable Lands		**37 hectares**
Equals: GROSS DEVELOPABLE AREA		**222 hectares**
GROSS DEVELOPABLE AREA		**222**
Less: Regional Land Uses		**43 hectares**
Equals: GROSS RESIDENTIAL AREA		**179 hectares**
Number of Units		**3,029 units**
Divided by Gross Residential Area		**179 hectares**
Equals: **DENSITY**		**17** UPH
	or	**7** UPA

Units per hectare - UPH
Units per acre - UPA

Non-Developable Lands include:	
Environmental Reserve	20
Expressways	8
Railways	4
Other Non-Developable Lands	5
	37 hectares

Regional Land Uses Include:	
Regional Open Space	5
Major Commercial Centres > 2.8 ha or 7 acres	8
Major Institutional Sites	5
Senior High Schools	9
Industrial areas	2
Lakes/water bodies	10
Other Regional Uses	4
	43 hectares

Gross Residential Area Include:	
Single Unit Residential	91
Multi Unit Residential	4
Local Commercial	5
Local Parks & Open Space	18
Elementary & Junior High School Sites	7
Local Roads & Lanes	41
Church Sites	1
Daycare Centres	1
Community Centres	2
Small Indoor Recreation Sites	1
Small Site Fire & Police Stations	1
Wet/Dry Ponds & Public Utility Sites	2
Other Local Uses	5
	179 hectares

The monitoring of Outline Plans submitted between 1999 and 2003 for the suburban developing communities in Calgary (plans that include multi-unit (apartment and townhouse) and single and semi detached) have averaged a density of 7.1 units per acre. In any particular year the average has ranged between 6.0 units per acre and 8.0 units per acre. In addition, individual outline plans submitted by individual developers also may vary significantly from area to area.

Average densities in developing communities have been increasing since the mid 1990's while occupancy rates have been decreasing. It is expected that demographic and market changes will lead to a gradual increase in the proportions of multi-unit units and smaller houses/lots being developed. This is already occurring in some communities and is consistent with policies contained within the Calgary Plan, encouraging innovative approaches in the design and development of new communities. This will prompt an increase in overall densities, in the variety of housing types, and in the capability for new housing to be integrated beyond the initial build-out of a community (*Calgary Plan* 2-2.2.2B). The Calgary Plan endeavours to ensure that new communities will work, over time, to achieve a target overall density of 6 - 8 units per gross residential acre (*Calgary Plan* 2-2.2.2C).

As mentioned the density of individual communities varies, depending on the mix of housing types (i.e., the proportion of single and semi-detached and multi-unit units), single and semi-detached lot sizes, and the extent of other land uses and amenities within the community, (e.g., local commercial sites, school sites, open spaces and transportation facilities). However, these variations are site-specific and, in terms of their impact on overall land requirements, should not affect the expected timing of utility extensions at the sector level.

In addition to the suburban demand Figure 20 provides a breakdown of the annual land requirements **city wide** through to the year 2008. Between 5,600 and 7,500 residential acres of land will be required between 2004 and 2008 to support total city wide unit development or approximately 1,100 to 1,560 acres per year using general density ranges of 6 to 8 units per acre need.

4 INDICATORS OF MARKET SHARE

There are four main data sources that are used to monitor market share trends: building permits, developers survey expectations, housing starts and subdivision activity. Information on each of these sources is outlined below.

4.1 Building Permit Statistics

Market share in the short-term is probably best reflected using the distribution of recent approved building permit applications (new units).

Building Permit figures are used to indicate the increase in dwelling units in developing communities and provide one indicator of past market performance. The distribution of this unit increase over the last five years, by complete sector (in Percentage), is provided in Figure 24. The delineation of sectors is illustrated on Map 1.

Building Permit information (new units added) is also used to provide the distribution of single and semi-detached building permit applications (Map 5) as well as the multi-unit distributions for 2003 by each sector (Map 6).

Much of the information presented in this report compares the developing communities relative to other developing communities in the city sectors as most of the new growth continues to occur in these areas. The communities that are considered to be developing are shown in Map 2.

Figure 25 shows the distribution of building permits for multi-unit housing units comparing the suburbs and the remainder of the city from 1999 - 2003. Comparisons are shown between development activity in the suburban sectors and the remaining Central sector, as well as between developing communities (i.e. those suburban communities currently experiencing significant construction of new units) and the remainder of the city. Over the last five years 43% of the new multi units applied for went into the new suburbs or developing communities. In 2003 this amount was 57%.

The Northwest, North and South sectors have been the city's strongest three growth areas over the past five years. In combination, these three sectors have accounted for roughly 60% of the new suburban housing market since 1999. The north half of the city (North, Northeast, and Northwest) has captured 55% of the housing market in the last five years where the south half (South and Southeast) of Calgary has captured 29%. The West had 16%. The share of total suburban single and semi-detached growth achieved in each sector, from 1999 to 2003, is illustrated in Figure 29 & 35. The distribution of market share for 2003 is shown in Figure 30.

Considering the single and semi-detached markets only, the Northwest, West and North sectors have shown the highest concentration of development since 1999. Together they accounted for roughly 59% of the new suburban growth. The Northwest at 26%, the West at 17% and the North at 16% continue to accommodate significant proportions of this development. However, it is important

to note that the diminishing capacities of some sectors such as the Northwest will impact future levels of growth and that sector market shares may significantly change from historical norms as capacities are reduced.

4.2 2004 Developers Survey

Each year The City of Calgary Urban Development Division surveys the development industry to determine areas where individual developers anticipate undertaking development. The results of the most recent survey are contained in Figure 36. These lands are located, generally, on Map 8.

This survey shows the distribution of Developer proposals for 2004, which identify possible locations and land estimates as indicated by the industry for residential development activity. These areas show intended areas for activity and do not necessarily indicate the expectation of immediate housing construction. It can not be assumed that these full areas will be developed in the 2004 season as the timing and scale of servicing and subdivision expectations often relate to a slightly longer time horizon and may be more directly affected by marketing strategies of individual developers.

4.3 Housing Starts

Information as collected by Canada Mortgage and Housing Corporation show that in 2003 there were 11,877 total housing starts in Calgary, of which 7,300 (61%) were for single units. An additional 608 (5%) starts were for semi detached units (Figure 22).

Single and semi-detached units continue to dominate the new housing market on a city-wide basis at 67% of the total new units. The multi-unit share of new housing starts represented 33% of total starts in 2003, with construction starting on 1,092 new townhouses and 2,877 new apartment units.

4.4 Subdivision Activity – Outline Plan and Tentative Plan Applications

Outline plans and subsequent land use applications are the large-scale designs and land use expectations required before the tentative plan stage of application.

Figure 15 illustrates the number of acres submitted for outline plan approval annually since 1991. Yearly averages of 3,045 acres have been applied for over the five-year period between 1999 and 2003. The year 2000 saw a high of 4,344 acres not seen since 1981 (4,482), while the last three years has been more consistent averaging around 3,000 acres per year. In 2003 outline plan applications dropped to 2,730 acres. In total over the last five years there has been 15,225 acres or 61.6 square kilometers (23.8 sq. miles) applied for in outline plans. In the previous five-year period between 1994 and 1998 the number was significantly lower at 9,103 total acres or 1,821 acres per year (36.8 sq. kilometers, 14.2 sq. miles). The last five years coincides with the recent high levels of growth Calgary has experienced since 1997.

Tentative Plans come on stream much closer to the actual building stage than do outline plans and act as a good indicator for short term (one to two years) development intentions.

Tentative plan applications city-wide (Figure 13) showed that in 2003 8,851 residential lots were approved. In the last five years this totalled to 36,978 lots averaging 7,396 lots per year for residential uses. Figure 14 shows the total number of lots for residential and non-residential uses submitted annually for tentative plan approval since 1991. In 2002, 10,716 lots were applied for. In 2003 this number stayed similar to the 2002 levels at 10,606 total lots in tentative plan applications.

5 LAND AVAILABLE FOR SUBURBAN RESIDENTIAL DEVELOPMENT

Land considered available, as of April 2003, for residential development in the suburban market includes four types of land:

- Vacant lots in new suburban communities.
- Land in the process of being subdivided.
- Vacant land with land use in place (approved).
- Those remaining lands which are, as yet, unsubdivided, but which are identified for future residential use.

The status of this supply changes constantly as approved lots are registered and serviced, as construction begins on vacant lots, and as plans are developed or amended. The intent here is to provide an accurate assessment of overall residential land supply, reflecting supply as of April 2003.

Servicing status in the developing areas of the suburbs changes constantly and the information shown within this document reflects the most current information available at the time of preparation of this report.

5.1 Vacant Residential Lot Inventory (U.D.I.)

The Calgary Chapter of the Urban Development Institute (U.D.I.) compiles a survey of vacant suburban residential lots which may or may not have shallow utilities in place. According to this survey in January 2004, there were approximately 9,168 vacant lots. The inventory between 1999 and 2003 has varied between 7,735 and 9,247 lots (Figure 5 and 6).

It should be noted that the surveys between The City and U.D.I. do not necessarily match in terms of the how counts are collected and locations of the survey but both are used as an indicator of supply capacity.

5.2 "Subdivided" Inventory of Available Residential Supply

A detailed inventory was made by Planning, Development & Assessment of the current capacities of single unit, semi-detached, row and apartment availability for each developing suburban community in the Calgary. The information consists of inventory as of April 2003. The inventory locates and counts the existing and under construction units using civic census information at the parcel level. In addition, the remainder of the vacant parcels from approved tentative plans are tracked and counted into this inventory through the use The City of Calgary's Geographical Information System, which locates and generates the available remaining lot supply. The results for this year show that approximately 13,344 total units could be built into the vacant lots as existed at that time. This supply includes those lots/potential units that were serviced and available to builders, as well as lots recently approved through tentative plans of subdivision that may or

may not be serviced with shallow utilities in place. Of this amount 10,765 vacant lots were available for single and semi-detached units while a 2,579 multi units capacity existed. Information on this can be found in Figure 7.

This is close to last year's (April 2002) inventory due to land being absorbed and new lands coming into the market place. The multi-units (apartment & townhouse) capacity has dropped significantly from last year's total supply of 4,072 to 2,579 available units. Given the total unit supply of approved vacant land the April 2003 inventory can accommodate just under two years of residential growth given current and expected demand. This does not include unsubdivided lands which when subdivided will add additional capacity.

The estimated suburban single and semi-detached lot supply, by sector, is detailed in Figure 7. The distribution of vacant lots is illustrated in Figure 8.

5.3 "Unsubdivided" Inventory of Available Residential Supply

In addition to the vacant subdivided land supply inventory, a detailed inventory of the remaining capacities of the unsubdivided supply is collected. The current unsubdivided suburban residential land supply is indicated, by sector, in Figure 11. The distribution of that land supply is shown on Figure 10. As of April 2003, there were an estimated 12,048 gross residential acres intended for residential and related uses. The information is collected from developer anticipated lot and unit counts, within approved outline plans for both single, semi-detached and multi-unit units and the remaining capacities of community plans. For lands without outline plans in place, density midpoints of community plans are used to calculate potential units. In total the unsubdivided land could accommodate approximately 85,400 new residential units, a 10 to 13 year supply at current growth rates. Map 3 shows the unsubdivided residential land supply for the entire city, while detailed maps of the residential land supply, by sector, are contained in Appendix II.

This inventory does not include large areas for which future land use policy has not yet been developed. These excluded areas are shown in Appendix II (Grey areas on the maps). They will continue to be excluded from the residential land inventory until community plans are in place and/or more extensive technical analysis is undertaken to determine the likely developable residential components.

The lands included in the inventory are classified according to the availability or capacity of water and sewer (storm and sanitary) services, as this infrastructure must be in place before development can proceed.

Areas classified as "Fully Serviced" have "Utility Capacity in Place" and indicate that major utility services have either been installed or will be provided by the developers without further major City expenditures, although the land is currently neither subdivided nor developed with on-site services. This means that the lands have the capacity to handle development. The two remaining classes describe lands with some, but not all, utility capacity in place (Partially Serviced) or lands having no capacity in place (Unserviced).

In Appendix II, lands within each sector are mapped according to servicing status. These servicing maps do not take into account the availability of downstream

transportation capacity, which is discussed throughout the text, nor do they indicate the costs to construct the required services. It cannot be assumed that areas classified as "Partially Serviced" are necessarily less costly to service (including transportation infrastructure) than those areas considered "Unserviced." Their relative cost depends very much on the unique circumstances in each area. In light of this, the coding of these two categories should not be construed to imply the intended sequence of development. Generally, servicing costs and attractiveness to the market have been the main determinants of when individual areas are brought on-stream. More specific information about servicing thresholds / budgets / constraints / sequencing will be provided through the *Accommodating Growth: Municipal Capital Investment Framework* report.

As noted above, transportation requirements may impose a further constraint on development, but the extent of constraint may vary from situation to situation. Although the required transportation facilities may be substantial in some situations, there is a greater degree of flexibility in the timing of the expenditures. Transportation facilities are not generally required in their final form until substantial development has occurred. Notwithstanding this, it must be emphasized that some of the areas discussed below, while having all or some utility capacity in place, may also have major transportation constraints which affect their developability in the 2004-2008 period (refer to Section 7).

It should also be noted that although The City may not be responsible for constructing major servicing projects in areas with utility capacity in place, it will still need to budget for "oversize" costs associated with specific transportation and utility improvements constructed by individual developers. "Oversize" costs are recovered from developers and in the case of transportation costs, they are recovered by means of major road assessments upon new developments.

Finally, it is noted that this servicing analysis does not take into account the related need for other public facilities (e.g., recreation facilities, libraries, fire stations) or services (e.g., transit, police, fire, EMS, social services) also required to support growth in a specific area. More specific information about facilities and services will be provided through the *Accommodating Growth: Municipal Capital Investment Framework* report.

5.3.1 Fully Serviced: Areas with Utility Capacity in Place

With the exception of the East sector, a supply of land exists in each sector which is immediately developable, with capacity in the system to develop with water and sewer (storm and sanitary) facilities in place. These areas are shown in "green" on the maps included in Appendices I and II.

These lands are not, as yet, subdivided, nor do they have local "on-site" services in place. There is, however, capacity in the utility "system" to accommodate their development without requiring significant City expenditures for major trunks, watermains, reservoirs, etc. In this sense, they are considered to be "Fully Serviced" with utility capacity in place. Of these areas, those with specific transportation system constraints are identified in Section 7.

These areas represent approximately 6,835 acres, of which 420 acres are identified for multi-unit use. In total, areas with utility capacity in place as of April

2003 could accommodate approximately 52,189 total units, (41,292 single and semi-detached units and 10,897 multi-unit units), in other words a six to eight year supply of residential growth (see Figures 9, 10 and 11).

Although each of these areas, in isolation, could develop without major expenditures for water and sewer lines, the cumulative effects of simultaneous development in all of these areas could result in a need for improvements in the facilities. Additional capital projects (treatment plants, reservoirs, etc.) will be required to meet increases in city-wide service demands as the city grows. Full development of many of these areas may also require major transportation improvements and provision of a variety of necessary public facilities and services. It is intended that these cumulative requirements will be identified and monitored through the *Accommodating Growth: Municipal Capital Investment Framework* report process.

5.3.2 Partially Serviced: Areas Having Some Utility Capacity in Place

In the areas considered as "Partially Serviced" some utility capacity exists (identified in "yellow" in Appendices I and II), and some capacity exists in at least one major municipal utility (storm sewer, sanitary sewer or water). In each instance, The City requires additional capital expenditures before large-scale development can commence. The areas designated as "Partially Serviced" total approximately 4,104 acres and could accommodate approximately 24,766 units. The full development of many of these (yellow) areas, on a sector basis, will require major transportation expenditures (see Figure 11).

5.3.2 Unserviced: Areas Having No Utility Capacity in Place

The third category of lands (shown in red in Appendices I and II) includes all of the remaining unsubdivided lands which are identified through policy reports, area structure plans and community plans (either approved or in preparation), and are identified in *The Calgary Plan*, as being suitable for future residential land use. These lands represent approximately 1,109 acres in total and could accommodate approximately 8,449 units. The full development of these areas may require major transportation improvements (see Figure 11).

5.4 Vacant Residential Supply With Land Use Approved

The available subdivided and unsubdivided land are added together to give total vacant residential supply. As of April 2003 there was 6,870 acres with approved land use in place that could accommodate approximately 53,064 units and house roughly between 148,000 and 159,000 people within this approved supply. It should be noted that not all of this land and unit capacity has full servicing in place. Approximately 500 acres with land use does not have full servicing capacity in place and is not immediately available for development. Locations of the areas with "vacant landuse approved" are identified on Map 4.

"Estimated" Development Potential Of Vacant Residential Land With Land Use Approval
As of April 2003

City Sector and Community	Serviced Land With Land Use (* Has All Major Utility Capacity in Place: Water, Storm & Sewer in Place)												Unserviced Land With Land Use Not all Major Utility Capacity in Place		Total Supply With Land Use Serviced & Unserviced Subdivided & Unsubdivided		
	(Subdivided Land) Tentative Plan Approved				(Unsubdivided Land) Outline Plan Approved					Total Supply Subdivided and Unsubdivided				(Unsubdivided) Outline Plan Approved		Total		
	Single (Units)	Multi (Units)	Total (Units)	Acres at 7 upa	Single (Units)	(Acres)	Multi (Units)	(Acres)	Total Acres	Single (Units)	Multi (Units)	Total (Acres)	Population Capacity	(Units)	(Acres)	Total (Units)	Population Capacity	Total Acres
NEW SUBURBS' TOTAL BY SECTOR																		
NORTH	1,471	1,225	2,696	385	7,964	1,258	3,390	129	1,387	9,435	4,615	1,772	40,750	92	23	14,142	41,110	1,795
NORTHEAST	1,184	443	1,807	230	780	127	0	0	127	1,964	443	357	6,920	0	0	2,387	6,960	357
EAST	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
SOUTHEAST	1,067	180	1,247	178	5,863	869	2,296	53	952	6,930	2,476	1,130	27,280	2,934	414	12,340	35,790	1,544
SOUTH	1,359	0	1,359	194	5,513	841	2,421	91	932	6,872	2,421	1,126	26,950	0	0	9,293	26,960	1,126
WEST	2,721	50	2,771	396	1,786	379	1,576	66	445	4,507	1,626	841	17,790	686	61	6,519	19,770	902
NORTHWEST	2,983	614	3,597	514	3,272	579	1,214	53	632	6,255	1,828	1,146	23,440	0	0	8,083	23,430	1,146
NEW SUBURBS' TOTAL																		
	10,765 Units	2,512 Units	13,277 Units	1,897 Acres	25,178 Units	4,053 Acres	10,897 Units	422 Acres	4,475 Acres	35,943 Units	13,409 Units	6,372 Acres	143,130 People	3,712 Units	498 Acres	53,864 Units	153,960 People	6,870 Acres

Note: Population Capacity = Units multiplied by 2.9 people per unit.
* Servicing Status is based upon definitions outlined in the Short-Term Growth Management Strategy Residential Update Report.
Serviced acres are areas where service capacity is available: I.e., water, and sewer (storm and sanitary).Meaning that capacity in the utility system exists to accommodate development without requiring significant City expenditures for major trunks, watermains, reservoirs, etc.
"Calculated" Density is based upon an assumed density of 7.0 units per acre where vacant remaining lots/units are not yet built.
"Planned Density" is based upon actual approved outline plans and midpoint densities of approved Community Plans.

Source: Planning Development & Assessment, 2004

5.5 Supply and Infrastructure

The supply of residential land categorized as "Fully Serviced" with "Utility Capacity in Place" is sufficient to satisfy expected demand on a city-wide basis through the five year forecast period. However, serviced land shortages may occur in particular sectors within the next five years unless new service extensions and projects are undertaken. As shown below the West and Northwest sectors show serviced land shortages within the next five years (Figure 40).

Short-Term Estimates of Residential Land Supply and Demand Conditions For Total Unit Growth (By Developing Communities), 2004 - 2008 — **Figure 40**

Requirements to April 2004 and ends at April 2008 to coincide with the annual civic census and land inventory

Sector	2004	2005	2006	2007	2008	Total Demand 2004-2008	Fully Serviced Supply With Utility Capacity (*) (Green areas)	Surplus or Shortfall By 2008(*)
North	204	214	224	229	237	1,100	1,845	745
Northeast	123	117	119	117	117	600	800	200
East	0	0	0	0	0	0	0	NA
Southeast	189	197	205	211	225	1,000	1,843	843
South	160	169	168	173	173	800	1,010	210
West	233	202	193	179	179	1,000	532	-469
Northwest	250	226	200	178	147	1,000	807	-193
Total	1,160 Acres	1,130 Acres	1,110 Acres	1,090 Acres	1,080 Acres	5,500 Acres	6,835 Acres	1,335 Acres

Notes: * Unsubdivided land only.Does not include existing subdivided vacant capacity

Excludes the following supply available in existing vacant subdivided lots (refer to Figure 7).

10,765	Single and Semi detached Units	1,538	Acres
2,579	Multi Unit (Apartment & Townhouse)	420	Acres
13,344	Total vacant subdivided units-unbuilt	1,958	Total available acres

Lands/units available as existing vacant subdivided as of April 2003 Inventory

Source: Planning, Development & Assessment, 2003

On the basis of the forecasts contained in this report, and assuming that a "Fully Serviced" supply of land with "Utility Capacity in Place" is maintained in each sector, The City should consider undertaking or facilitating utility extensions over the next five years in the sectors shown below.

Sector	Probable year utility extensions needed to service growth demand	Utility extensions required for areas considered "partially serviced" (yellow areas)
North	After 2008 After 2008	Water Sanitary
Northeast	2007	Water
East	------	------
Southeast	After 2008 After 2008	Water Storm
South	2006 2006	Storm Sanitary
West	2004	Water
Northwest	------	------

It cannot be assumed that "yellow" areas will be developed before "red" areas (areas with no capacity in place).

Transportation

In terms of transportation requirements, the existing transportation infrastructure with the identified upgrading and new links (refer to Section 7 Influencing Factors) has the capacity to support the initial development of most areas. However, the new subdivisions will impact the adjoining transportation network. **It should be noted that many intersections throughout the city are already operating at capacity and failing during peak periods.** These new developments, compound with the overall growth in the city, will further degrade the level of service of the transportation system unless additional expenditures are made beyond those in The City's current capital budget envelope. Alternatively, measures implemented to increase the current modal split in favour of modes other than auto could lesson the demand on the transportation road network, especially during the peak travel periods. **It should be recognized that this report does not address the downstream transportation impacts generated by suburban growth.**

Transportation Infrastructure Investment Plan (TIIP)

The Transportation Infrastructure Investment Plan includes upgrading and extensions to the roadway network, expansion of the existing LRT system, and purchase of new buses and light rail vehicles. The TIIP reflects the goals of the *Calgary Transportation Plan* (transportation system up to a population of 1.25 million) and is part of a comprehensive approach to transportation planning in Calgary. The TIIP is reviewed and approved annually by Council and is the approved list of specific priority projects for anticipated funding. It translates the long-range network development plan into a program of improvements to be implemented over the coming years.

The total 2004 – 2010 TIIP program budget is estimated at $930 Million for transportation and transit projects across the city. The City of Calgary and three partners jointly provide this funding. The Government of Alberta as of 1999 has committed a significant share by providing ongoing transportation infrastructure funding at 5 cents for each litre of fuel sold in Calgary. In 2002 The City of Calgary received $88 million from this source. The other key partners include the developers through transportation acreage assessment and the Calgary Parking Authority who have also committed to provide additional funding for transportation projects.

For further information on the TIIP, see the Capital Budget 2004-2008.

6 SUBURBAN RESIDENTIAL DEVELOPMENT (SUPPLY AND DEMAND)

The purpose of this report is to examine, on an annual basis, the expected fit between residential land demand and supply over the coming five-year period. The intent is to identify whether a sufficient supply of readily developable land exists, in a variety of locations, to facilitate competitive land and housing markets.

The comparison of supply and demand is based upon a set of assumptions regarding the level of population growth, the character of housing demand and the expected distribution of that demand among the competing growth corridors. As the housing market and population demographics changes, these assumptions can be expected to change as well.

This report provides a basis for estimating the expected market share of housing starts in the short-term, **although it is recognized that major shifts in activity can and do occur from time to time** as a result of individual developers opening up or completing particular subdivisions.

Figure 38 provides estimates of the number and distribution of total housing starts, by sector and for the developing communities, over the 2004-2008 period. This distribution, by sector, is illustrated in Figure 39. Figure 40 estimates the annual demand for residential land, in each sector, and relates these demand forecasts to the existing inventory of unsubdivided lands considered "Fully Serviced". Supplementary information related to the rate of development, land supply, and remaining housing and population capacity within the individual communities in each sector is contained in Appendix II. Since much of this document deals with the new developing growth areas, information specific to these areas is provided throughout this document.

Map 9 provides an overall view **of the possible distribution** of both housing growth (approximately 30,200 single and semi-detached and up to 7,500 multi-units) and population growth of approximately 100,000 within developing areas over the next five years. This distribution is based on the assumptions and forecasts outlined in this report. It takes into consideration many factors including the importance of areas where strong developer competition exists.

Caveat:

As with any forecast growth locations should be considered as possible growth directions. Actual locations may and do vary. The colours denote general development patterns of which the specific timing of development is not certain. To keep information as relevant as possible this analysis will be reviewed and updated annually. Finally these forecasts are not intended to control absorption rates or limit choice and competition in the market place.

The City of Calgary is presently in the process of negotiating annexation of new lands in various areas outside of the city's current jurisdictional boundary. If additional lands are annexed over the next year a portion of this growth may shift to other areas presently outside the city's boundary, resulting in changes to servicing, transportation and planning approval considerations. Modifications to the growth allocations and the forecast map may be affected, and will be included in future updates of this report.

6.1 Methodology for Assigning Growth into the New Suburbs

This report is based upon forecasts and data that operate on an April to April annual cycle coinciding with the annual civic census. When this report is released each year the analysis is based on data from the previous April. In addition year-end information is also monitored in much of the report. This year's 2004-2008 annual update is based upon April 2003 inventory data and the forecasts of growth represent the growth that is expected as of this date to the year 2008 (April). Using the information provided from the annual civic census and remaining planned land supply, information is generated to produce an accurate inventory of the available land supply.

Civic Census information and other available data is compiled through Geographical Information Systems software to compile a inventory of remaining residential capacity by community for each year that shows:

- The existing units/population (civic census).
- The housing that is under construction (civic census).
- The vacant residential sites/lots, single and multi-unit.
- The vacant tentative plans.
- The vacant outline plans (including their developer anticipated housing capacities or remaining as approved).
- The vacant approved lands with land use in place.
- The remaining capacities of community plans.

Sample of the Vacant Suburban Residential Land Inventory

Legend

April 2003 Civic Census Status
- Existing Parcels Residential or Other
- Vacant
- Under Construction

Other
- Land Use Boundaries
- Transportation Utility Corridor

Remaining Residential Land Supply
- Tentative Plan Application
- Vacant Subdivided with approved Tentative Plan
- Vacant Remaining Outline Plan (Unsubdivided)
- Vacant Remaining Community Plan (Unsubdivided)

This inventory acts as the basis for knowing what capacities each developing suburban area has remaining. This is the **starting point** for which to allocate and build-out the population and housing.

City wide projections for population and housing growth is provided by economic group within Land Use Planning & Policy which allocates this city forecast into seven suburban sectors by transportation zone and community based upon a market share approach. Information that is collected and considered prior to any forecast allocations is outlined below.

- Existing units / population
- Under construction units (single and multi)

Sample of the Vacant Suburban Residential Land Inventory

This inventory acts as the basis for knowing what capacities each developing suburban area has remaining. This is the **starting point** for which to allocate and build-out the population and housing.

City wide projections for population and housing growth is provided by economic group within Land Use Planning & Policy which allocates this city forecast into seven suburban sectors by transportation zone and community based upon a market share approach. Information that is collected and considered prior to any forecast allocations is outlined below

- Existing units / population
- Under construction units (single and multi)

- Vacant lots/units (tentative plan – subdivided).
- Vacant lot/units (pending tentative plans - unsubdivided).
- Remaining capacity (units and acres) of approved outline plans with land use in place.
- Capacities of pending outline plans.
- Remaining capacity of approved and preliminary community plans.
- Estimated capacity of future potential residential growth areas.
- Current servicing capacities of all lands with community plans in place (storm, water, sanitary).
- Transportation constraints / opportunities & construction timing.
- Developer submissions – concept plans, phasing information.
- Airphoto and GIS interpretations of constraints, i.e. factors influencing growth such as 15% slopes etc., grading locations where surface scraping is occurring for land preparations (indicates development is near).
- Historical and current market shares of the housing market by community and sector are tracked and monitored for levels of growth and trends for growth (lifecycle of community) are evaluated.
- Community growth rate/amounts is the growth constant?
- Is there potential for increased or decreased community growth?
- Does the community or sector have potential to increase growth at the expense of another sector?
- What is the general housing market type e.g. starter home, estate housing, etc.?

Assumptions are based upon historical and expected trends such as:

- Percentage of total growth (population and housing) that is expected to go to the new future suburban sectors versus the existing built form.
- Density: units per acre (assumptions are only used where no detailed information exists such as actual land use and developer projections or community plan density ranges).
- Market share by city sector and community. Historical trends are considered for the next five-year as a guide and are modified if warranted e.g. the NW Sector has remaining supply limitations decreasing this sectors share from historical norms. As this occurs the share of growth will change in other impacted sectors as the Northwest sector communities build out.
- Occupancy rates or persons per unit are needed to allocate population to the forecasted units and depends on the actual planned land that is approved i.e. multi sites, single family areas etc.. Various occupancy rates are used as determined by the approved housing mix in a particular community).

Based on the above, the method used is to assign population, housing, and acres to probable residential growth locations until sector forecasts are met for the time

periods required and distribute the expected growth at the transportation zone and community district level. In allocating this growth the following items are monitored and considered.

Servicing and Transportation

Areas having full servicing (green) in place and appear "ready to go" may have other constraints such as transportation which may impact the timing of area developments. It is not necessarily the case that a green or "Fully Serviced" area will develop first over a yellow or red area if all other factors are considered. If developer intentions for front ending costs or City budgets change so can the status of the lands. Allocation of growth into "Fully Serviced" areas are a good indicator (but not the only one) for the initial five-year allocations.

Developers land transactions and cost sharing agreements often impact the expectation for growth and can bring on new areas sooner than expected. It can have an impact on the market in such that growth can shift dramatically into new areas and slow down in other existing approved areas.

Land Use

Areas with land use approved are considered for build out first **if** full servicing (green) is available or if servicing solutions are near term to make an area serviced or green and **if** the resulting sector's and communities' market share makes sense. Areas with large amounts of land with land use approved but where market share is low may not build out faster than other areas or before other areas open up through land use approvals. As an example, a sector (or community) having a historical and stable market share of 15% would not generate a 30% share in the short term just because there is a large supply of approved land use in place. There needs to be some evidence or assumption-changing condition that needs to exist before an area could warrant such an increase.

There are many locations that have servicing constraints that are time sensitive and can not accommodate growth into areas of approved land use until a later date due to budget timing reasons. This has to be considered in locating future growth bands. There are examples throughout the city where land use had been approved for several years yet no start up construction has occurred within the area due to various constraints that impact the site.

Other

Market shares are impacted by other situations such as competition, capacity and location. This can slow or in other cases aid in the growth of a particular area.

Lastly, in addition to all of the above particular developer phasing and developer growth projections are considered wherever supplied by the development industry. However, these projections are on occasion represent differing views of total city wide growth expected compared to The City of Calgary projections. There can also exist differing views of community and sector growth assumptions by individual developer. The City of Calgary must balance all individual developer forecasts that it receives against a city-wide forecast. The City incorporates land,

housing and population forecasts based upon the expected growth using detailed models to provide the picture for Calgary over the next five years and does not solely rely on the city's past performance as the only indicator.

Some of the more broad and general elements that can impact both short and long term growth locations are shown in the graphic below and can be considered as **"Factors Influencing Development"**.

6.2 City Wide Demand, 2004 to 2008

Calgary grew by 102,981 people over the last five years (1999-2003) and as of the April 2003 civic census the city population was at 922,315 people.

The city forecast for 2004 to 2008 (five years) adds 93,685 additional people or 18,737 people per year for a population of 1,016,000 people by April 2008. An expected 45,000 more housing units are forecast over the same period.

6.3 Suburban Communities Supply and Demand

The developing communities in Calgary added 41,610 total units between 1999 and 2003 (five years) based upon building permit applications. In relation to this the forecasts for the next five years for the developing communities is for 37,770 total units.

Historical Developing Communities Shares (Total Units)														
	1999		2000		2001		2002		2003		1999-2003	Average 1999-2003	Average 2001-2003	Average 2002-2003
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	total units	Average Share (%)	Average Share (%)	Average Share (%)
North	18%	1,188	14%	1,006	12%	946	17%	1,782	19%	1,852	6,776	16%	17%	18%
Northeast	12%	792	12%	846	15%	1,118	12%	1,186	10%	913	4,864	12%	12%	11%
East	1%	72	0%	0	0%	0	0%	0	0%	0	72	0%	0%	0%
Southeast	10%	662	12%	867	9%	645	13%	1,309	16%	1,599	5,151	12%	13%	15%
South	20%	1,370	19%	1,427	18%	1,347	14%	1,402	16%	1,514	7,060	17%	16%	15%
West	10%	669	14%	1,017	17%	1,308	17%	1,700	19%	1,800	6,554	16%	18%	18%
Northwest	29%	1,949	29%	2,145	30%	2,331	27%	2,781	20%	1,925	11,133	27%	28%	24%
Total	100%	6,722	100%	7,340	100%	7,697	100%	10,288	100%	9,963	41,610	100%	100%	100%

Five year average number of units to the Developing Communities = 8,322

On average over the last five years 8,322 total units were built in the developing communities based upon New Units added through building permits.

EXISTING SUPPLY

Including all the developing communities within Calgary as identified by Map 2 and as monitored in April 2003 (to coincide with the timing of the annual Civic Census) the combined total of all the developing communities had an inventory of:

- Existing total units (Civic Census): 54,516 of which 3,732 total units were under construction (3,095 single family and semi-detached / 637 multi-unit).
- Vacant capacity with land use approved: 53,064 units, 6,870 acres.
- Vacant subdivided capacity with tentative plans approved: 13,344 total (10,765 single family and semi-detached / 2,579 multi-unit).
- Vacant unsubdivided considered "fully serviced with utility capacity in place": 52,189 total units and 6,835 acres available (41,292 single family & semi detached / 10,897 multi-unit).
- Vacant unsubdivided considered "partially serviced with some capacity in place": 24,766 total units and 4,104 acres.
- Vacant unsubdivided and considered "unserviced with no capacity in place": 8,449 total units and 1,109 acres.

The total unsubdivided "fully serviced" capacity of 52,189 total units, 6,835 acres city-wide could accommodate all of the next five years forecast at 37,770 units. However, this should not constrain new development areas from opening up if the merits of the application meet with city requirements. In addition, particular growth in individual sectors may require servicing solutions prior to the full capacity stated here being fully built out.

6.3 Suburban Communities Supply and Demand

The developing communities in Calgary added 41,610 total units between 1999 and 2003 (five years) based upon building permit applications. In relation to this the forecasts for the next five years for the developing communities is for 37,770 total units.

Sector	Historical Developing Communities Shares (Total Units)										1999-2003	1999-2003 Average	2001-2003 Average	2002-2003 Average
	1999		2000		2001		2002		2003					
	Share	Units	Share	Units	Share	Units	Share	Units	Share	Units	Units	Share	Share	Share
North	14%	1,140	14%	1,034	17%	1,314	17%	1,792	19%	1,852	6,776	16%	17%	18%
Northeast	12%	792	12%	846	15%	1,116	12%	1,195	10%	913	4,864	12%	12%	11%
East	1%	72	0%	0	0%	0	0%	0	0%	0	72	0%	0%	0%
Southeast	10%	662	12%	937	8%	645	13%	1,369	16%	1,539	5,151	12%	13%	15%
South	20%	1,370	19%	1,427	18%	1,414	14%	1,432	10%	1,014	7,060	17%	15%	12%
West	10%	665	14%	1,017	17%	1,309	17%	1,760	19%	1,802	6,554	16%	18%	18%
Northwest	33%	2,281	29%	2,141	25%	1,950	27%	2,731	26%	2,470	11,133	27%	26%	24%
Total	100%	6,722	100%	7,340	100%	7,697	100%	10,288	100%	9,563	41,610	100%	100%	100%

Five year average number of units to the Developing Communities = 8,322

On average over the last five years 8,322 total units were built in the developing communities based upon new units added through building permits.

EXISTING SUPPLY

Including all the developing communities within Calgary as identified by Map 2 and as monitored in April 2003 (to coincide with the timing of the annual Civic Census) the combined total of all the developing communities had an inventory of:

- Existing total units (Civic Census): 54,516 of which 3,732 total units were under construction (3,095 single family and semi-detached / 637 multi-unit).
- Vacant capacity with land use approved: 53,064 units, 6,870 acres.
- Vacant subdivided capacity with tentative plans approved: 13,344 total (10,765 single family and semi-detached / 2,579 multi-unit).
- Vacant unsubdivided considered "fully serviced with utility capacity in place": 52,189 total units and 6,835 acres available (41,292 single family & semi detached / 10,897 multi-unit).
- Vacant unsubdivided considered "partially serviced with some capacity in place": 24,766 total units and 4,104 acres.
- Vacant unsubdivided and considered "unserviced with no capacity in place": 8,449 total units and 1,109 acres.

The total unsubdivided "fully serviced" capacity of 52,189 total units, 6,835 acres city-wide could accommodate all of the next five years forecast at 37,770 units. However, this should not constrain new development areas from opening up if the merits of the application meet with city requirements. In addition, particular growth in individual sectors may require servicing solutions prior to the full capacity stated here being fully built out.

DEMAND ASSUMPTIONS FOR THE NEW SUBURBS, 2004 TO 2008

Forecast Share of Population Growth to the New Suburbs: 107%

Historically based upon a five-year growth average the new developing suburbs have gained between 100% and 110% on of the city's population growth. Essentially what this means is that all of the new population growth has been occurring in the new suburbs. In addition to this, up to 10% more growth has been showing up in the new suburbs that have come from older more established areas of Calgary, as families' age and young adults form new households.

	City Total Forecast (Total Units)					2004 - 2008
	2004	2005	2006	2007	2008	
City Total	9,100	9,100	9,000	8,900	8,900	45,000

	Historical Share			Developing Communities Forecast (Total Units)								
	Average	Average	Average	2004		2005		2006	2007	2008		
	5 year	3 year	2 year									
Northeast	12%	12%	11%	11%	800	11%	820	11%	830	11%	820	11%	4,150	800
Northwest												0%	0	0
Southeast	12%	13%	15%	18%	1,420	19%	1,480	20%	1,540	21%	1,580	20%	7,710	1,000
South												18%	6,730	800
West	16%	19%	16%	17%	1,330	15%	1,150	15%	1,100	14%	1,020	15%	5,620	1,000
Western												15%	5,600	1,000
Developing Total					7,770		7,610		7,540		7,420		37,770	5,500

Notes: Total unit acres is based on a variety of densities from actual approved planned land supply using Tentative Plan and Outline Plan build out capacities. These capacities are from actual build out of these areas for each sector and reflect the five year 2004-2008 blue growth bands.

What Does This Mean?

The population gain projected for Calgary between 2004 to 2008 is 93,700. At 107% the population growth forecast to the new developing suburbs is expected to be approximately 100,300 people (**20,000 people per year**). During the same period it is expected 37,770 total units (30,230 single family/semi-detached and 7,540 multi-unit) will be required in the new communities to accommodate this growth. The Balance of the city wide total forecast of 45,000 units in this same period will be constructed in the established areas of the city.

The developing communities as of April 2003 had approximately 6,870 acres available for residential development and an unbuilt capacity for 53,000 units with approved land use in place. The mixture of unit types impacts the people per unit as these areas build out. Apartments and townhouse or row house units have smaller average occupancy rates than single unit dwellings. Building out areas with significant multi unit capacity yields lower average occupancy rates. Areas that generally are dominated by single unit development will have higher rates. Using the approved land use results in more specific occupancy rates or ppu depending on the actual housing expected in the area.

This report uses the site-specific capacities whenever possible as provided by the approved land use and, if provided, the developer land, housing and population capacities.

For areas where no detailed land use exists, 3.0 people per unit is used.

DEMAND ASSUMPTIONS FOR THE NEW SUBURBS, 2004 TO 2008

Forecast Share of Population Growth to the New Suburbs: 107%

Historically based upon a five-year growth average the new developing suburbs have gained between 100% and 110% on of the city's population growth. Essentially what this means is that all of the new population growth has been occurring in the new suburbs. In addition to this, up to 10% more growth has been showing up in the new suburbs that have come from older more established areas of Calgary, as families' age and young adults form new households.

	City Total Forecast (Total Units)					2004 - 2008
	2004	2005	2006	2007	2008	Total
	Units	Units	Units	Units	Units	Units
City Total	9,100	9,100	9,000	8,900	8,900	45,000

	1999-2003 Historical Share			Developing Communities Forecast (Total Units)												
	Average	Average	Average	2004		2005		2006		2007		2008		Average	Total	Total
	%	%	%	%	Units	%	Units	%	Units	%	Units	%	Units	Share (%)	Units	Acres
	5 year	3 year	2 year													
North	16%	17%	18%	18%	1,430	20%	1,500	21%	1,570	22%	1,600	22%	1,660	21%	7,760	1,100
Northeast	12%	12%	11%	11%	860	11%	820	11%	830	11%	820	11%	820	11%	4,150	600
East	0%	0%	0%	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0
Southeast	12%	13%	15%	18%	1,420	19%	1,480	20%	1,540	21%	1,580	23%	1,690	20%	7,710	1,000
South	17%	15%	15%	16%	1,280	18%	1,350	18%	1,340	19%	1,380	19%	1,380	18%	6,730	800
West	16%	18%	18%	17%	1,330	15%	1,150	15%	1,100	14%	1,020	14%	1,020	15%	5,620	1,000
Northwest	27%	26%	24%	19%	1,450	17%	1,310	15%	1,160	14%	1,030	11%	850	15%	5,800	1,000
Developing Total	100%	100%	100%	100%	7,770	100%	7,610	100%	7,540	100%	7,430	100%	7,420	100%	37,770	5,500

Notes: Total unit acres is based on a variety of densities from actual approved planned land supply using Tentative Plan and Outline Plan build out capacities.
These capacities are from actual build out of these areas for each sector and reflect the five year 2004-2008 blue growth bands.

SOURCE: Planning Development & Assessment, 2003 - Socio-Economic Outlook 2003-2008 Calgary and Region Report, 2003

What Does This Mean?

The population gain projected for Calgary between 2004 to 2008 is 93,700. At 107% the population growth forecast to the new developing suburbs is expected to be approximately 100,300 people (**20,000 people per year**). During the same period it is expected 37,770 total units (30,230 single family/semi-detached and 7,540 multi-unit) will be required in the new communities to accommodate this growth. The Balance of the city wide total forecast of 45,000 units in this same period will be constructed in the established areas of the city.

The developing communities as of April 2003 had approximately 6,870 acres available for residential development and an unbuilt capacity for 53,000 units with approved land use in place. The mixture of unit types impacts the people per unit as these areas build out. Apartments and townhouse or row house units have smaller average occupancy rates than single unit dwellings. Building out areas with significant multi unit capacity yields lower average occupancy rates. Areas that generally are dominated by single unit development will have higher rates. Using the approved land use results in more specific occupancy rates or ppu depending on the actual housing expected in the area.

This report uses the site-specific capacities whenever possible as provided by the approved land use and, if provided, the developer land, housing and population capacities.

For areas where no detailed land use exists, 3.0 people per unit is used.

7 SUBURBAN RESIDENTIAL DEVELOPMENT BY SECTOR 2004 TO 2008

7.1 North Sector

The developing communities in the North sector accounted for a 16% share of the new total unit market share between 1999 and 2003 adding 6,776 total units based upon building permit applications. Single family and semi-detached also accounted for 16% of the market share (5,387 units) in relation to the other developing suburban sectors around the city.

In the year 2003 the sector accounted for 19% of the growth up from 17% in the year 2002 adding 1,852 total units (1,406 single family and semi detached) based upon building permit applications. The community with the highest number of units applied for was Coventry Hills with 470 followed by Panorama Hills at 469. **These two communities represented spot number seven and eight respectively out of the top ten communities city-wide for new unit applications.**

	Historical Developing Communities Shares (Total Units)										1999-2003	Average 1999-2003
	1999		2000		2001		2002		2003		total	Average
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	units	Share (%)
North	18%	1,188	14%	1,008	12%	946	17%	1,782	19%	1,852	**6,776**	**16%**

EXISTING SUPPLY

For the communities of Hidden Valley, Panorama Hills, Coventry Hills, Country Hills Village, Evanston and Symons Valley, as monitored in April 2003 (to coincide with the timing of the annual civic census) the North Sector had an inventory in the new suburban communities of:

- Total units: 9,578 of which 686 total units were under construction (498 single family and semi-detached / 188 multi-unit).
- Vacant capacity with land use approved: 14,142 units, 1,795 acres.
- Vacant subdivided capacity with tentative plans approved: 2,696 total (1,471 single family and semi-detached / 1,225 multi-unit).
- Vacant unsubdivided considered "fully serviced with utility capacity in place": 14,641 total units and 1,845 acres available (11,251 single family and semi-detached / 3,390 multi-unit)
- Vacant unsubdivided considered "partially serviced with some capacity in place": 8,503 total units and 1,269 acres.
- Vacant unsubdivided and considered "unserviced with no capacity in place": 488 total units and 59 acres.

This sector has an unsubdivided "fully serviced" capacity of 14,641 total units, 1,845 acres. This supply can accommodate all of the next five years forecasted growth. However, this should not constrain new development areas from opening up if the merits of the application meet with city requirements. Total build-out of all these communities in this sector regardless of its servicing status is 15 to 20 years.

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

- Forecast market Share average over the next five years: 21%
- Forecast population: 19,000 to 23,300
- Forecast housing: 7,760 total units
- Forecast land needs: 1,100 acres

	Historical Share			Developing Communities Forecast (Total Units)											
	Average	Average	Average	2004		2005		2006		2007		2008		Average	Total	Total
				%	Units	%	Units	%	Units	%	Units	%	Units	Share	Units	Acres
	5 year	3 year	2 year													
North	16%	17%	18%	19%	1,430	20%	1,500	21%	1,570	22%	1,600	22%	1,660	21%	7,760	1,100

Serviced land capacity for the areas of Coventry Hills, Panorama Hills remains good with significant long term capacities in Evanston and Symons Valley remaining for construction of new homes. This remaining capacity as well as the building out of the Northwest sector should benefit the North in its future growth.

Continued growth in Panorama Hills and Coventry Hills is expected to keep the market shares constant with the sectors past performance. Hidden Valley has been effectively built-out in the summer of 2003. With the newly developing communities of Symons Valley and Evanston this market share has the ability to grow and absorb the higher levels of market increases expected over the next five years. In addition the sector has a significant amount of "fully serviced" capacity in which to accommodate this growth.

Recent growth and the additional approval of land use in the Evanston area could impact and increase the levels of growth higher than projected for this community than shown on map 9 page A-35.

INFLUENCING FACTORS

Beddington Trail / Symons Valley Road will provide the primary road access to the Symons Valley community in the first few years of development.

Capacity improvements to the interchange at Deerfoot Trail and Country Hills Boulevard were completed in 2003.

Stoney Trail will be built by the Province as a four-lane roadway between Country Hills Boulevard and Deerfoot Trail by 2007. The Province is looking at constructing partial (staged) interchanges along Stony Trail within the $250 Million Budget. Timing and location of these has not been determined.

This sector has an unsubdivided "fully serviced" capacity of 14,641 total units, 1,845 acres. This supply can accommodate all of the next five years forecasted growth. However, this should not constrain new development areas from opening up if the merits of the application meet with city requirements. Total build-out of all these communities in this sector regardless of its servicing status is 15 to 20 years.

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

- Forecast market Share average over the next five years: 21%
- Forecast population: 19,000 to 23,300
- Forecast housing: 7,760 total units
- Forecast land needs: 1,100 acres

	Historical Share			Developing Communities Forecast (Total Units)												
	Average % 5 year	Average % 3 year	Average % 2 year	2004 %	2004 Units	2005 %	2005 Units	2006 %	2006 Units	2007 %	2007 Units	2008 %	2008 Units	Average Share (%)	Total Units	Total Acres
North	16%	17%	18%	18%	1,430	20%	1,500	21%	1,570	22%	1,600	22%	1,660	**21%**	**7,760**	**1,100**

Serviced land capacity for the areas of Coventry Hills, Panorama Hills remains good with significant long term capacities in Evanston and Symons Valley remaining for construction of new homes. This remaining capacity as well as the building out of the Northwest sector should benefit the North in its future growth.

Continued growth in Panorama Hills and Coventry Hills is expected to keep the market shares constant with the sectors past performance. Hidden Valley has been effectively built-out in the summer of 2003. With the newly developing communities of Symons Valley and Evanston this market share has the ability to grow and absorb the higher levels of market increases expected over the next five years. In addition the sector has a significant amount of "fully serviced" capacity in which to accommodate this growth.

Recent growth and the additional approval of land use in the Evanston area could impact and increase the levels of growth higher than projected for this community than shown on map 9 page A-35.

INFLUENCING FACTORS

Beddington Trail / Symons Valley Road will provide the primary road access to the Symons Valley community in the first few years of development.

Capacity improvements to the interchange at Deerfoot Trail and Country Hills Boulevard were completed in 2003.

Stoney Trail will be built by the Province as a four-lane roadway between Country Hills Boulevard and Deerfoot Trail by 2007. The Province is looking at constructing partial (staged) interchanges along Stony Trail within the $250 Million Budget. Timing and location of these has not been determined.

Country Hills Boulevard will be widened to six-lanes between Barlow Trail and Coventry Boulevard by 2010.

Improvements to 16 Avenue North between 6 Street East and 12 Street West from four to six lanes by 2006.

Beddington Trail will be widened to six-lanes between Country Hills Boulevard and Deerfoot Trail by 2005.

Shaganappi Trail will be widened to four-lanes between Country Hills Boulevard and Edgemont Boulevard by 2007.

7.2 Northeast Sector

The developing communities in the Northeast sector accounted for a 12% share of the new total unit market share between 1999 and 2003 adding 4,864 total units based upon building permit applications. Single family and semi-detached accounted for 14% of the market share (4,634 units) in relation to the other developing suburban sectors around the city.

In the year 2003 the sector accounted for 10% of the growth down from 12% in the year 2002 adding 913 total units (913 single family and semi-detached) based upon building permit applications. The community with the highest number of units applied for was Taradale with 486 followed by Saddleridge at 351. **Taradale represented spot number five out of the top ten communities city-wide for new unit applications.**

	Historical Developing Communities Shares (Total Units)										1999-2003	Average 1999-2003
	1999		2000		2001		2002		2003			
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	total units	Average Share (%)
Northeast	12%	792	12%	848	15%	1,118	12%	1,195	10%	913	4,864	12%

EXISTING SUPPLY

For the communities of Martindale, Taradale, Saddleridge, as monitored in April 2003 (to coincide with the timing of the annual civic census) the Northeast sector had an inventory in the new suburban communities of:

- Existing total units: 6,604 of which 409 total units were under construction (409 single family and semi-detached / 0 multi-unit).
- Vacant capacity with land use approved: 2,387 units, 357 acres.
- Vacant subdivided capacity with tentative plans approved: 1,607 total (1,164 single family and semi-detached / 443 multi-unit).
- Vacant unsubdivided considered "fully serviced with utility capacity in place": 5,491 total units and 800 acres available (5,491 single family and semi-detached / 0 multi-unit).

- Vacant unsubdivided considered "partially serviced with some capacity in place": 0 total units and 0 acres.
- Vacant unsubdivided and considered "unserviced with no capacity in place": 0 total units and 0 acres.

This sector has an unsubdivided "fully serviced" capacity of 5,491 total units, 800 acres. This supply can accommodate all of the next five years forecasted growth. However, this should not constrain new development areas from opening up if the merits of the application meet with city requirements. Transportation Planning has identified downstream transportation issues in this area and is evaluating what other specific infrastructure will be required to support growth when a population threshold of 16,500 is reached. Future lands not yet available for development in this sector will increase this supply once community plans are prepared for areas north of Saddleridge.

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

- Forecast market share average over the next five years: 11%
- Forecast population: 10,400 to 12,700
- Forecast housing: 4,150 total units
- Forecast land needs: 600 acres

	Historical Share			Developing Communities Forecast (Total Units)													
	Average	Average	Average	2004		2005		2006		2007		2008		Average	Total	Total
	%	%	%	%	Units	%	Units	%	Units	%	Units	%	Units	Share (%)	Units	Acres
	5 year	3 year	2 year													
Northeast	12%	12%	11%	11%	660	11%	620	11%	830	11%	820	11%	620	11%	4,150	600

The serviced land capacity for the areas of Martindale, Taradale and Saddleridge remains good with significant capacities in Taradale and Saddleridge still remaining for construction of new homes.

Little capacity was remaining for the community of Martindale in April 2003 and is effectively built out for the purposes of this report. But with continued growth in Taradale and Saddleridge these communities are expected to keep the market shares constant with the sectors performance in the last several years. Future residential areas north of Saddleridge should have a regional policy plan in place guiding the broad issues and designs for the area sometime in 2004. A follow up community plan should be started in 2004 and ready sometime in 2005 for the more detailed levels of planning.

INFLUENCING FACTORS

Improvements to 36 Street N.E. including widening between McKnight Boulevard and 64th Avenue N.E. to four lanes and construction of an interchange at McKnight Boulevard are expected to be completed by 2005.

McKnight Boulevard will be twinned to create a four-lane road between 52 Street N.E. to 68 Street N.E. by 2004.

The northeast LRT will be extended two kilometres along 36 Avenue, from the Whitehorn station to the new proposed Westwinds/McKnight station with proposed opening in 2007.

The upgrading of 32 Avenue N.E. from four lanes to six lanes between 12 Street N.E. and Barlow Trail is planned by 2005.

The Province is planning to construct the N.E. portion of the East Freeway between Deerfoot Trail and the TransCanada Highway between 2006 and 2010. A functional study for the East Freeway is currently underway and preliminary plans indicated that interchanges will be constructed at Deerfoot Trail, 36th Street, 60th Street, Country Hills Boulevard, Airport Trail, McKnight Boulevard and the TransCanada highway.

Transportation Planning has identified downstream transportation issues in this area and is evaluating what other specific infrastructure will be required to support growth beyond certain population thresholds identified in the Saddleridge Area Structure Plan.

Sour gas facilities may have a strong affect on the use, configuration and development of land in the sector.

7.3 East Sector

EXISTING SUPPLY

There are no actively developing new communities.

This sector remains essentially built-out with regards to new significant residential growth and has no existing residential capacity for new community growth remaining. This does not, as with all other sectors, preclude that there will always be small pocket development occurring in redevelopment areas within existing communities.

	Historical Developing Communities Shares (Total Units)										1999-2003	Average 1999-2003
	1999		2000		2001		2002		2003		total	Average
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	units	Share (%)
East	1%	72	0%	0	0%	0	0%	0	0%	0	72	0%

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

- Forecast market share average over the next five years: 0%
- Forecast population: 0 people
- Forecast housing: 0 total units
- Forecast land needs: 0 acres

	Historical Share			Developing Communities Forecast (Total Units)												
	Average	Average	Average	2004		2005		2006		2007		2008		Average	Total	Total
	%	%	%	%	Units	%	Units	%	Units	%	Units	%	Units	Share (%)	Units	Acres
	5 year	3 year	2 year													
East	0%	0%	0%	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0

Although no new communities have opened up in the East sector in the last few years, the area is still monitored in the possible case of new lands coming on stream through land use opportunities or annexation additions. It is anticipated that annexation in this corridor could be achieved as early as 2005 or in 2006. Should this occur the community planning process that would guide growth could occur shortly after possible annexation.

INFLUENCING FACTORS

The twinning of 68 Street East from a two lane to four-lane road between Memorial Drive and 17 Avenue S.E. is planned for 2004.

7.3 Southeast Sector

The developing communities in the Southeast sector accounted for a 12% share of the new total unit market share between 1999 and 2003 adding 5,151 total units based upon building permit applications. Single family and semi-detached accounted for 12% of the market share (3,989 units) in relation to the other developing suburban sectors around the city.

In the year 2003 the sector accounted for 16% of the growth up from 13% in the year 2002 adding 1,559 total units (1,208 single family and semi-detached) based upon building permit applications. The community with the highest number of units applied for was McKenzie Towne with 690 followed by Copperfield at 377. **These two communities represented spot number three and nine respectively out of the top ten communities city-wide for new unit applications.**

	Historical Developing Communities Shares (Total Units)										1999-2003	Average 1999-2003
	1999		2000		2001		2002		2003		total	Average
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	units	Share (%)
Southeast	10%	682	12%	897	8%	646	13%	1,368	16%	1,559	5,151	12%

EXISTING SUPPLY

For the communities of McKenzie Towne, New Brighton, Copperfield, Cranston, and the new Community Plan A area known as Auburn Bay, as monitored in April 2003 (to coincide with the timing of the annual Civic Census) the Southeast sector had an inventory in the new suburban communities of:

- Existing total units: 3,909 of which 541 total units were under construction (541 single family and semi-detached / 0 multi-unit).
- Vacant capacity with land use approved: 12,340 units, 1,544 acres.
- Vacant subdivided capacity with tentative plans approved: 1,247 total (1,067 single family and semi-detached / 180 multi-unit)

- Vacant unsubdivided considered "fully serviced with utility capacity in place": 14,359 total units and 1,843 acres available (12,063 single family and semi-detached / 2,296 multi-unit).
- Vacant unsubdivided considered "partially serviced with some capacity in place": 4,757 total units and 667 acres.
- Vacant unsubdivided and considered "unserviced with no capacity in place": 4,095 total units and 583 acres.

This sector has an unsubdivided "fully serviced" capacity of 14,359 total units, 1,843 acres. This supply can accommodate all of the next five years forecasted growth. However, this should not constrain new development areas from opening up if the merits of the application meet with city city requirements. Total build-out of all these communities in this sector regardless of its servicing status is 15 to 20 years. The southeast sector has further capacity once new community plans are prepared that will give the southeast a long term capacity for growth beyond 20 years.

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

- Forecast market share average over the next five years: 20%
- Forecast population: 18,300 to 22,400
- Forecast housing: 7,710 total units
- Forecast land needs: 1,000 acres

	Historical Share			Developing Communities Forecast (Total Units)												
	Average % 5 year	Average % 3 year	Average % 2 year	2004 %	2004 Units	2005 %	2005 Units	2006 %	2006 Units	2007 %	2007 Units	2008 %	2008 Units	Average Share (%)	Total Units	Total Acres
Southeast	12%	13%	15%	16%	1,420	19%	1,480	20%	1,540	21%	1,580	23%	1,690	20%	7,710	1,000

Serviced land capacity for the areas of McKenzie Towne, Cranston, and Auburn Bay (Community Plan 'A') remains good. Servicing solutions are being continually worked on for the eastern areas of New Brighton and Copperfield with some developer solutions being used to continue growth into these areas.

The Sector has a significant number of community plans in place combined with the continued growth in all these communities and the addition of a new community east of Cranston (Auburn Bay Community Plan 'A') will aid in the increased expectation for higher growth in this sector. In addition to the existing plans now in place there is a new community plan in 2005 proposed for south of Copperfield below the Transportation Utility Corridor.

The Province has committed to the building of a hospital just east of Cranston and south of the new community of Auburn Bay. Construction of the hospital should occur as soon as 2005. The hospital site (possible construction within the next five years), a future employment area and the newly opened Deerfoot Trail in this area should also assist in the future growth of the southeast.

Recent growth and the continued success in the Copperfield area could impact and increase the levels of growth higher than projected for this community than shown on map 9 page A-35.

INFLUENCING FACTORS

New interchanges are operational and completed along Deerfoot Trail at Barlow Trail, Marquis of Lorne Trail and McKenzie Lake Boulevard.

Two additional interchanges will be constructed by the Province along Deerfoot Trail at 130 Avenue in 2004 and Douglasdale Boulevard in 2005.

The widening (two lane to four lane) of Glenmore Trail between 52 Street S.E. and 68 Street N.E. with anticipated completion in 2004.

Marquis of Lorne Trail is expected to be twinned between MacLeod Trail and Bow River in 2008.

52 Street East from Glenmore Trail to 114 Avenue South will be widened from two to four lanes by 2005.

Glenmore Trail from Ogden Road to Deerfoot Trail is anticipated to be upgraded from four to six lanes by 2009.

24 Street S.E. from Glenmore Trail to 90 Avenue S.E. will be rebuilt to a new four-lane roadway by 2004.

The Province has tentative plans to construct the Southeast section of East Freeway from TransCanada Highway to Highway 22x between 2008 and 2012. The Province is considering P3 (Private, Public Partnership) opportunities for this section of East Freeway which may result in the project timing being advanced. A functional study is currently underway and preliminary plans indicate that interchanges will be constructed at 17th Avenue, Peigan Trail, Glenmore Trail, 114th Avenue, 130th Avenue and 52 Street.

The Province will complete upgrades to the interchange at Glenmore Trail and Deerfoot Trail in 2006 and 2007.

7.4 South Sector

The developing communities in the South sector accounted for a 17% share of the new total unit market share between 1999 and 2003 adding 7,060 total units based upon building permit applications. Single family and semi detached accounted for 15% of the market share (5,118 units) in relation to the other developing suburban sectors around the city.

In the year 2003 the sector accounted for 16% of the growth up from 14% in the year 2002 adding just over 1,514 total units (966 single family and semi-detached) based upon building permit applications. The community with the highest number of units applied for was Evergreen with 966 followed by Bridlewood at 344 and Chaparral with 204 total units. **Evergreen represented spot number one out of the top ten communities city-wide for new unit applications.**

	Historical Developing Communities Shares (Total Units)										1999-2003	Average 1999-2003
	1999		2000		2001		2002		2003		total	Average
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	units	Share (%)
South	20%	1,370	19%	1,427	18%	1,347	14%	1,402	16%	1,514	7,060	17%

EXISTING SUPPLY

For the Communities of: Chaparral, Bridlewood, Evergreen and the future community of Silverado (Community 'A'), as monitored in April 2003 (to coincide with the timing of the annual Civic Census) the South sector had an inventory in the new suburban communities of:

- Existing total units: 5,429 of which 278 total units were under construction (278 single family and semi-detached / 0 multi-unit).
- Vacant capacity with land use approved: 9,293 units, 1,126 acres.
- Vacant subdivided capacity with tentative plans approved: 1,359 total (1,359 single family and semi-detached / 0 multi-unit)
- Vacant unsubdivided considered "fully serviced with utility capacity in place": 8,453 total units and 1,010 acres available (6,032 single family and semi-detached / 2,421 multi-unit).
- Vacant unsubdivided considered "partially serviced with some capacity in place": 1,740 total units and 304 acres.
- Vacant unsubdivided and considered "unserviced with no capacity in place": 3,906 total units and 467 acres.

This sector has an unsubdivided "fully serviced" capacity of 8,453 total units, 1,010 acres. This supply can accommodate all of the next five years forecasted growth. However, this should not constrain new development areas from opening up if the merits of the application meet with city city requirements. Total build-out of all these communities in this sector regardless of its servicing status is less than 15 years unless new community plan areas are approved.

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

- Forecast market share average over the next five years: 18%
- Forecast population: 15,200 to 18,600
- Forecast housing: 6,730 total units
- Forecast land needs: 800 acres

	Historical Share			Developing Communities Forecast (Total Units)												
	Average %	Average %	Average %	2004 %	2004 Units	2005 %	2005 Units	2006 %	2006 Units	2007 %	2007 Units	2008 %	2008 Units	Average Share (%)	Total Units	Total Acres
	5 year	3 year	2 year													
South	17%	15%	15%	16%	1,200	18%	1,350	18%	1,340	19%	1,380	19%	1,360	18%	6,730	800

Serviced land capacity remains good with significant capacities in Evergreen and Chaparral still remaining for construction of new homes. This capacity will need to be increased before the five-year time frame of this report should the market shares continue to ensure a reasonable supply of land in this sector. It is anticipated that annexation in this corridor could be achieved as early as 2004 or in 2005. Should this occur the community planning process that would guide growth could happen shortly after annexation. The Silverado/Southwest Community Plan 'A', will add a new community sometime in 2004. In addition a regional policy plan is proposed for lands west of the community of Evergreen in 2005/2006. With annexation it is expected that a regional policy plan will be prepared in 2004/2005 followed by a community plan in 2005/2006.

Growth in this sector is expected to rise from the 14% in 2002 and 16% in 2003 to higher levels between 2004 to 2008. The market shares should be consistent with the sectors past performance of 17% on average rising from 16% in 2004 to 19% by 2008. Chaparral will be completely built-out within the next five years and the planned regional policy plans and community plans should allow for continued expectation of available lands to support these market shares into the next five years.

INFLUENCING FACTORS

The construction of the Sarcee Trail S.W. bridge over Fish Creek is underway and completion is expected by 2005. The road will be a four-lane roadway.

Anderson Road between 24 Street and 37 Street West will be upgraded from two lanes to four lanes with anticipated completion in 2004.

14 Street between 90 Avenue and Anderson Road will be widened from four lanes to six lanes in 2005. The construction of the 14 street / 90 Avenue interchange is expected to commence in 2010.

The south LRT extensions to 146 Avenue and 162 Avenue are complete.

The upgrading of 162 Avenue S.E. from east of Macleod Trail (Sunpark Gate) to Shawville Way to a four-lane roadway with dual left turn lanes is anticipated in 2004.

Marquis of Lorne Trail will be widened to a four-lane between MacLeod Trail and the Bow River Bridge by 2005.

Upgrades along 14 Street between Anderson Road and Canyon Meadows Drive will provide four lanes by 2010.

The Glenmore Trail and Elbow Drive interchange construction will be completed by 2007.

Northbound MacLeod Trail will be widened to four lanes between Canyon Meadows Drive and Shawnessy Boulevard by 2004.

7.5 West Sector

The developing communities in the West sector accounted for a 16% share of the new total unit market share between 1999 and 2003 adding 6,554 total units based upon building permit applications. Single family and semi-detached accounted for 17% of the market share (5,567 units) in relation to the other developing suburban sectors around the city.

In the year 2003 the sector accounted for 19% of the growth up from the last several years of 17% (2001, 2002). In 2003 this added 1,800 total units (1,415 single family and semi-detached) based upon building permit applications. The community with the highest number of units applied for was Springbank Hill with 481 followed by Cougar Ridge at 367. **These two communities represented spot number six and ten respectively out of the top ten communities city-wide for new unit applications.**

	Historical Developing Communities Shares (Total Units)										1999-2003	Average 1999-2003
	1999		2000		2001		2002		2003		total	Average
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	units	Share (%)
West	10%	669	14%	1,017	17%	1,308	17%	1,760	19%	1,800	6,554	16%

EXISTING SUPPLY

For the communities of Crestmont, Cougar Ridge, West Springs, Aspen Woods, Springbank Hill, Discovery Ridge, Strathcona Park, and Signal Hill, as monitored in April 2003 (to coincide with the timing of the annual civic census) the North sector had an inventory in the new suburban communities of:

- Existing total units: 11,239 of which 635 total units were under construction (635 single family and semi-detached / 0 multi-unit).
- Vacant capacity with land use approved: 6,819 units, 902 acres.
- Vacant subdivided capacity with tentative plans approved: 2,838 total (2,721 single family and semi-detached / 117 multi unit)
- Vacant unsubdivided considered "fully serviced with utility capacity in place": 3,794 total units and 532 acres available (2,218 single family and semi-detached / 1,576 multi-unit).
- Vacant unsubdivided considered "partially serviced with some capacity in place": 9,766 total units and 1,864 acres.
- Vacant unsubdivided and considered "unserviced with no capacity in place": 0 total units and 0 acres.

This sector has an unsubdivided "fully serviced" capacity of 3,794 total units, 532 acres. This supply currently **cannot** accommodate all of the next five years forecasted growth without servicing solutions. Total build-out of all these communities in this sector regardless of its servicing status is 15 to 20 years.

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

- Forecast market share average over the next five years: 15%
- Forecast population: 14,100 to 17,200
- Forecast housing: 5,620 total units
- Forecast land Needs: 1,000 acres

	Historical Share			Developing Communities Forecast (Total Units)												
	Average	Average	Average	2004		2005		2006		2007		2008		Average	Total	Total
	%	%	%	%	Units	%	Units	%	Units	%	Units	%	Units	Share (%)	Units	Acres
	5 year	3 year	2 year													
West	16%	18%	18%	17%	1,330	15%	1,150	15%	1,100	14%	1,020	14%	1,020	**15%**	**5,620**	**1,000**

Currently the serviced land capacity for this sector is low with limited water supply for new developments over the next five years. However, a water reservoir and significant water servicing upgrades planned for 2004 for the area should allow for more capacity before full development constraints will occur. Population thresholds that impact water availability currently exist in specific areas of the west sector which could have impacts on the amount and timing of near term housing growth.

Once these water and other servicing issues are resolved and these thresholds are removed the increased land availability as well as the continuing building out of the Northwest sector and its diminishing supply of land should continue to benefit or maintain the West in its future growth.

Continued choice of communities and the amenities that this sector offers as well as the diminishing supply of growth opportunities in the Northwest sector has helped to contribute in increased growth in the market share for the West. With seven communities in which to locate, current development in this sector has maintained a significant market share.

In recent years the share of growth to the West sector has been between 17%-19% of the total units. The complications to sustaining this continued level of growth is that much of this sectors land supply has multiple small parcel ownership and fragmented areas that could slow growth levels. The market share in this forecast may not be reached if servicing solutions and land fragmentation (ownership) issues are not resolved within the next few years. It is for these reasons that the forecasts shown in Figure 38 are more moderate at 15% over the next five-year period.

INFLUENCING FACTORS

Bow Trail is planned to be upgraded to six lanes between Crowchild Trail and Sarcee Trail by 2009.

Capacity improvements to Bow Trail and Sarcee Trail intersection will be completed in 2004.

17th Avenue is currently being upgraded to a four-lane roadway between 69th Street and 85 Street and will be completed in 2004.

Glenmore Trail will be widened from a four-lane road to a six-lane road from Crowchild Trail to Sarcee Trail by 2005.

Improvements to Sarcee Trail and 17 Avenue S.W. intersection are anticipated by 2004.

Current information indicates that the Province does not intend to build Stoney Trail from TransCanada Highway to Highway 8 until after 2012.

7.6 Northwest Sector

The developing communities in the Northwest sector accounted for a 27% share of the new total unit market share between 1999 and 2003 adding 11,133 total units based upon building permit applications. Single family and semi-detached accounted for 25% of the market share (8,302 units) in relation to the other developing suburban sectors around the city.

In the year 2003 the sector accounted for 20% of the growth down from 27% in the year 2002 adding 1,925 total units (1,401 single family and semi-detached) based upon building permit applications. The community with the highest number of units applied for was Royal Oak with 732 followed by Tuscany at 654. **These two communities represented spot number two and four respectively out of the top ten communities city-wide for new unit applications.**

	Historical Developing Communities Shares (Total Units)										1999-2003	Average 1999-2003
	1999		2000		2001		2002		2003		total	Average
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	units	Share (%)
Northwest	29%	1,949	29%	2,145	30%	2,333	27%	2,781	20%	1,925	**11,133**	**27%**

EXISTING SUPPLY

For the communities of Valley Ridge, Tuscany, Rocky Ridge, Royal Oak, Arbour Lake, Citadel and the Hamptons, as monitored in April 2003 (to coincide with the timing of the annual civic census) the North sector had an inventory in the new suburban communities of:

- Existing total units: 17,757 of which 1,183 total units were under construction (734 single family and semi-detached / 449 multi-unit).
- Vacant capacity with land use approved: 8,083 units, 1,146 acres.
- Vacant subdivided capacity with tentative plans approved: 3,583 total (2,983 single family and semi-detached / 614 multi-unit)
- Vacant unsubdivided considered "fully serviced with utility capacity in place": 5,421 total units and 807 acres available (4,237 single family and semi-detached / 1,214 multi-unit).
- Vacant unsubdivided considered "partially serviced with some capacity in place": 0 total units and 0 acres.
- Vacant unsubdivided and considered "unserviced with no capacity in place": 0 total units and 0 acres.

This sector has an unsubdivided "fully serviced" capacity of 5,421 total units, 807 acres. This supply can accommodate all of the next five years forecasted growth when including the vacant subdivided capacity. Total build-out of all these communities in this sector is five to seven years.

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

- Forecast market share average over the next five years: 15%
- Forecast population: 13,300 to 16,200
- Forecast housing: 5,800 total units
- Forecast land needs: 1,000 acres

	Historical Share			Developing Communities Forecast (Total Units)												
	Average % 5 year	Average % 3 year	Average % 2 year	2004 %	2004 Units	2005 %	2005 Units	2006 %	2006 Units	2007 %	2007 Units	2008 %	2008 Units	Average Share (%)	Total Units	Total Acres
Northwest	27%	26%	24%	19%	1,450	17%	1,310	15%	1,160	14%	1,030	11%	850	**15%**	**5,800**	**1,000**

Serviced land capacity for all the developing communities remains good however over the next five years the bulk of the remaining lands available for development will be built-out without future additions to the land inventory in this sector. Possible annexation of a limited amount of lands over the next few years along the TransCanada Highway west may offer extended growth options to the sector. If the annexation of lands does occur a possible community plan may be prepared in 2005/2006, which then could allow for continued growth to the sector.

The growth projected over the next five years almost effectively builds out the Northwest sector. Little capacity will remain in this area after 2008 and complete build-out is expected between 2008-2009 based upon the existing capacity of the sector as it is now.

Historically the strongest growth corridor or sector of the city, the Northwest is now producing lower market shares as the number of communities are building out and the supply is becoming limited. This sector achieved a high percentage of the city-wide growth of 24% to 30% of the market over the last 10 years, a very significant amount that will now start to show up into other sectors of the city. It is expected to migrate into the North sector, with smaller shares to the west sector.

INFLUENCING FACTORS

Crowchild Trail will be widened from four lanes to six lanes between 53 Street and Nose Hill Drive by 2005.

Shaganappi Trail will be twinned from two lanes to four lanes between Country Hills Boulevard and Edgemont Boulevard by 2007.

Stoney Trail will be built by the Province as a four-lane roadway between Country Hills Boulevard and Deerfoot Trail by 2007. The Province is looking at constructing partial (staged) interchanges along Stony Trail within the $250 Million Budget. Timing and location of these has not been determined.

Sarcee Trail will be widened from two lanes to four lanes between Country Hills Boulevard and John Laurie Boulevard in 2004.

The extension of the NW LRT to Dalhousie Station together with a park 'n' ride lot and interchanges on Crowchild Trail at Brisbois Drive, Northland Drive and 53 Street N.W. was completed in 2003.

An agreement is in place to stage upgrading of Rocky Ridge Road from two to four lanes, and to construct Country Hills Boulevard from Rocky Ridge Road to Stoney Trail.

8 SERVICING IMPLICATIONS

8.1 The Need for Utility Extensions

The serviced residential land supply is an existing inventory of vacant residential capacity in the unsubdivided areas considered "fully serviced" with utility capacity in place (the green areas in Appendices I and II). This provides enough capacity for an estimated 52,200 total units or approximately 146,000 to 157,000 people. These lands should provide sufficient inventory to accommodate expected city-wide demand through the five year forecast period. In addition to this but not shown on the Appendices maps are an additional 13,300 vacant subdivided unit capacity which can represent an additional one to two years of capacity. However, there will be serviced land shortages in particular sectors within the next five years. Extension of city utilities will be required if these sectors are to continue developing.

The timing of utility extensions is to be reviewed in the context of the policies contained in the Calgary Plan. The following specific policies provide the basis for this review:

- The City will endeavour to accommodate growth while at the same time attempting to avoid premature investment in municipal infrastructure (2-2.2.2.1G).
- Make decisions on capital expenditures relating to the extension and/or upgrading of municipal water, storm, sanitary, and transportation systems, through the normal budgeting process and after consideration has been given to the overall capital cost implications of the extensions, including
  - the cost of other services The City provides;
  - the municipality's financial capability;
  - existing market conditions and anticipated demand as they relate to the proposed expenditure; and
  - the impact of these decisions on the provision of gas, electric, telephone and cable services. (2-2.2.2.1I)
- Evaluate actual expenditure decisions related to the construction of municipal infrastructure through The City's growth management decision-making process. (2-2.2.2.1H)

The *Short Term Growth Management Strategy* (approved in February 1985) indicates that, through its normal planning and budgeting processes, The City will endeavour to incorporate sufficient lead times so that it can be in a position to construct the municipal infrastructure required to provide the supply of serviced land determined to be necessary under Calgary Plan policy 2-2.2.2.1.

On the basis of the forecasts and allocations contained in this report, and if a reasonable supply of land considered "fully serviced" with utility capacity in place is maintained in each sector, The City should consider undertaking or facilitating utility extensions over the next five years in the following sectors.

Sector	Probable year utility extensions needed to service growth demand	Utility extensions required for areas considered "partially serviced" (yellow areas)
North	After 2008 After 2008	Water Sanitary
Northeast	2007	Water
East	------	------
Southeast	After 2008 After 2008	Water Storm
South	2006 2006	Storm Sanitary
West	2004	Water
Northwest	------	------

It cannot be assumed that "yellow" areas will be developed before "red" areas (areas with no capacity in place).

Notwithstanding the overall availability of serviced land, it is expected that requests to extend utilities and transportation services into new areas will continue to be made.

8.2 Implications of the "Serviceable" Land Supply

In dealing with shortages of land supply in a particular sector, Council may or may not choose to expend funds to service new lands, given the availability of serviced land in other sectors. All scheduled budget information is tentative and subject to final City Council approval for each year's budget. In considering funding, the following implications should be taken into account.

The development of those areas shown to have major utility capacity in place offers several benefits, including:

- **Minimizing** the assumption of new debt by The City in accommodating growth in the short-term (i.e., not contributing to an increase in the existing debt/capita ratio);
- **Reducing** pressures on The City's operating budgets in terms of debt servicing and overall operating efficiencies and;

On the other hand, limiting development to those lands having utility capacity currently in place may not satisfy all of the requirements of the marketplace with respect to:

- Providing a sufficient number of locations (choices) for each market segment; and
- Providing a readily developable supply of land in each sector.

In addition, there may be other factors which influence the need for, or the timing of, service extensions in particular areas and which are not strictly related to local demands for residential land. For example, specific service extensions may also satisfy demands for non-residential uses, such as industrial development, or resolve existing servicing problems in the sector.

It is within the context of these divergent interests that The City's growth management processes must:

- Provide a context for setting the budgeting priorities of each service department in relation to a shared view of the development pattern expected to emerge over the coming five year period; and
- Provide current information upon which Council can respond to the requests of individual landowners situated beyond the fully serviced areas.

The *Short-Term Growth Management Strategy* provides mechanisms through which Council can balance these varying interests in a consistent and rigorous way. The City also anticipates requests from individual developers to extend services to new areas. *Accommodating Growth: Municipal Capital Investment Framework* outlines the protocol for evaluating these requests through the policy plan and outline plan processes and the Growth Management Technical Team and Growth Management Committee when required.

This Strategy also serves as the basis for developing cost-sharing agreements on the extension of services into new areas. Specifically, cost-sharing arrangements between The City and developers have been approved for:

- Country Hills Boulevard NW extension;
- Harvest Hills (transportation improvements);
- Panorama Hills (transportation improvements at Country Hills Boulevard/ Deerfoot Trail interchange);
- Martindale (sanitary and storm sewers);
- McKenzie Lake and McKenzie Towne (sanitary and storm sewers);
- Shawnessy/Somerset (storm sewers and transportation);
- Patterson Heights (sanitary and storm sewers);
- Strathcona Cell H (sanitary and storm sewers);
- Arbour Lake (storm sewers);
- Crestview (waterworks);
- Crowchild IV/Hamptons (transportation improvements);
- Rocky Ridge (sanitary and storm sewers and transportation);
- Valley Ridge (sanitary sewers and transportation);

- West Scenic Acres/Tuscany (sanitary and storm sewers and transportation improvements);
- Royal Oak (waterworks);
- 37 Street Bridge and related upgrades (transportation and storm sewers);
- Symons Valley (sanitary);
- North Beddington (storm sewer); and
- 17 Avenue S.W. Watermain (Waterworks).

8.3 Servicing Implications by Sector

This section briefly describes the major utilities needed to service future residential development in each sector (the "yellow" and "red" areas shown on Maps 1 to 7 in Appendix II). Notwithstanding the identification of these infrastructure requirements in this report, there is no assurance that individual elements will actually be constructed in the short-term, as a result of capital funding constraints.

8.3.1 North Sector

Coventry Hills and Panorama Hills

Sewers:

- Wastewater has budgeted for 2003 and 2004 to pay back the developer for the upgraded storm sewer. The alignment has been finalized and financing arrangements are completed.
- Full development of the "green" areas in Panorama Hills requires extension of the North Beddington Sanitary Sewer Trunk by the developer in 2003-2004 and completion of the storm sewer upgrade described above.

Symons Valley

Sewers:

- Wastewater has budgeted to pay back the developers for construction of the Beddington Creek 2 Sanitary Trunk. Sanitary trunk extensions will be built by the developers under an agreement with The City.
- Stormwater drains to West Nose Creek, with storm water retention facilities and pipes being constructed by developers.

Waterworks:

- Servicing of the westerly portions of Symons Valley, above the 1,190 m contour (Top Hill and Nose Hill pressure zones), can occur through distribution main extensions across the Transportation/Utility Corridor (TUC).
- A feedermain extension on Symons Valley Road will be required to support development along the western edge of the Spy Hill Pressure Zone.
- The area above the 1148 m contour (Big Hill Pressure Zone) requires a feedermain extension on Sarcee Trail and a reservoir near the city limits to the north.

Evanston

Waterworks:

- A 400 mm off-site water distribution main across Stoney Trail and routed through Panorama Hills to the east, is required to complete servicing to the yellow area at the north end of Evanston. This main is to be funded by the area developers.
- Development of Evanston to 144th Avenue will require feedermain extensions on 4th Street and 144th Avenue.

North Sector Overall

Long-term growth in the North and Northeast sectors will require construction of a reservoir on the western edge of Nose Hill Park, in conjunction with the phased extension of the Shaganappi Trail Water Feedermain between the Big Hill Pump Station and the Beddington Reservoir.

8.3.2 Northeast Sector

Sewers:

- The Northridge-McDonald Trunk is budgeted for 2005 and 2006. This will service lands between Nose Creek and Deerfoot Trail as well as lands east of Deerfoot Trail and north of 96 Avenue N.E.

Waterworks:

- Further phases of the 60 Street N.E. feedermain project will be required as development proceeds.

8.3.3 East Sector

- No further additions to the residential land base are expected for this sector in the short term.

8.3.4 Southeast Sector

McKenzie Towne

Sewers:

- Build-out of portions of the area will require extension of a sanitary sewer trunk as part of the proposed New Brighton and Copperfield subdivisions (funds are budgeted for 2005 and 2006). Servicing will be via lift station pumping back to the McKenzie Trunk. Only portions of these subdivisions will be approved for development until such time as the Shepard storm system is available (wetland physically constructed). Financing arrangements with Wastewater may require negotiation.

Cranston

Sewers:

- Full development of the area will require storm and sanitary infrastructure.
- A sanitary syphon is budgeted for 2007 and 2008.
- The sanitary trunk for this area will be directed to the future Pine Creek Wastewater Treatment Plant (Phase 1) which is expected to be operational by 2007.

Waterworks:

- Full development of the area will require water transmission (City supplied main feedermains) system improvements, including feedermain extensions, a new reservoir, a flow control station and a new pump station.

Auburn Bay "Community Plan A"

Sewers:

- Initial development of the area requires storm and sanitary infrastructure budget and timing to be determined.

Southeast Sector Overall:

Pine Creek Wastewater Treatment Plant will be designed in 2004 and construction will occur between 2005-2007. The Pine Creek Sanitary Trunk from the Fish Creek Wastewater Treatment Plant will run on the west side of the Bow River and is expected to be completed on the same schedule as the plant. The syphon under the Bow River to Cranston is required for all future lands in this area.

8.3.5 South Sector

Chaparral

Waterworks:

- The Macleod Trail Feedermain Phase 1, servicing growth in Chaparral and located between Sun Valley Boulevard and Chapalina Crescent S.W., is required to reinforce the distribution network in the Chaparral area.

Somerset, Bridlewood, Evergreen

Sewers:

- The area will require extension of the Midnapore Sanitary Sewer Trunk along 162 Avenue S.W. to 24 Street S.W.
- A new storm trunk will be required to service the Fish Creek / 37 Street Storm Catchment. Financing arrangements between the developer and Wastewater may be required.
- The area will also require the extension of a new storm outfall to Fish Creek, subject to Provincial approval and resolution of financing. Wastewater have tentatively budgeted to construct the Fish Creek / 37 Street Storm Trunk in 2006.
- The new community plan being prepared for the area known as Silverado (Community Plan 'A') will require a trunk from Pine Creek Water Treatment Plant before full development of the area.

Waterworks:

- The Evergreen Ridge pump station can service a population of 13,000 between the elevation of 1,108 and 1,146 (Westview Pressure Zone). Ultimately a feedermain and reservoir will be required to serve the built out Westview pressure zone.
- Development in the southern parts of the Westview Pressure Zone, particularly south of 162 Avenue, will require looped distribution mains extended from the Evergreen Ridge Pump Station. These extensions will be built at developer cost.

South Sector Overall

Pine Creek Wastewater Treatment Plant will be designed in 2004 and construction will occur between 2005-2007. The Pine Creek Sanitary Trunk from the Fish Creek Wastewater Treatment Plant will run on the west side of the Bow River and is expected to be completed on the same schedule as the plant. Servicing any future lands in this area requires the trunk presently budgeted for 2006 and 2007.

8.3.6 West Sector

Calgary West & Cougar Ridge

Waterworks:

- A water feedermain extension, across the Bow River, is required to extend south into Calgary West. A new reservoir with a pump station is required to provide service between the 1,209 m contour and the 1,248 m contour (Broadcast Hill Pressure Zone). Above 1,248 m, requirements for water servicing have not been determined.
- Waterworks plan to construct the Old Banff Coach Road Feedermain Phase 1 and the Broadcast Hill reservoir in 2004.

West Springs, Aspen Woods, Springbank Hill, Discovery Ridge

Sewers:

- The storm sewer through Discovery Ridge to Highway 8 has been constructed. Alignment for storm and sanitary sewer in the 85 Street S.W. right-of-way north of Highway 8 has been finalized. Wastewater has approved budget for the construction of the 85 Street Sanitary Trunk. Budgeting for this storm sewer is currently beyond the ten-year window. Discussions with area developers are occurring to allow a private storm acreage assessment in this area.
- The 101 Street S.W. catchment area will require a new storm trunk and other storm water management facilities.

Waterworks:

- The Broadcast Hill and Strathcona water pressure zones (above 1,169 m) can accommodate a total population of 32,000. Above 32,000 people, a reservoir is required to be located to the west of the existing city limits. This would require feedermains along Old Banff Coach Road. The 2003 Civic Census presently shows a population of 26,207 in these areas. This population threshold may, in specific areas of the west sector impact the amount and timing of near term housing growth and put limits on the continued development of housing until the reservoir is completed. Currently, expected construction for the reservoir and feedermain is in 2004.
- The Glendale and West Calgary water pressure zones can accommodate development below the elevation of 1,169 m between 69 Street S.W. and the eastern edge of the major ravine in Sections 3 and 10 of Township 24, Range 2, west of the Fifth Meridian. Development west of this ravine will require connection to proposed existing transmission/distribution systems in the upper Broadcast Hill/Strathcona zones, including two Flow Control Stations. A feedermain extension on 69 Street and 17 Avenue to 85 Street will also be required.

8.3.7 Northwest Sector

Rocky Ridge, Royal Oak

Waterworks:

- A feedermain extension on 112 Avenue N.W. to the Top Hill Reservoir is required for ultimate servicing. Waterworks plans to construct the Country Hill feedermain in 2004.

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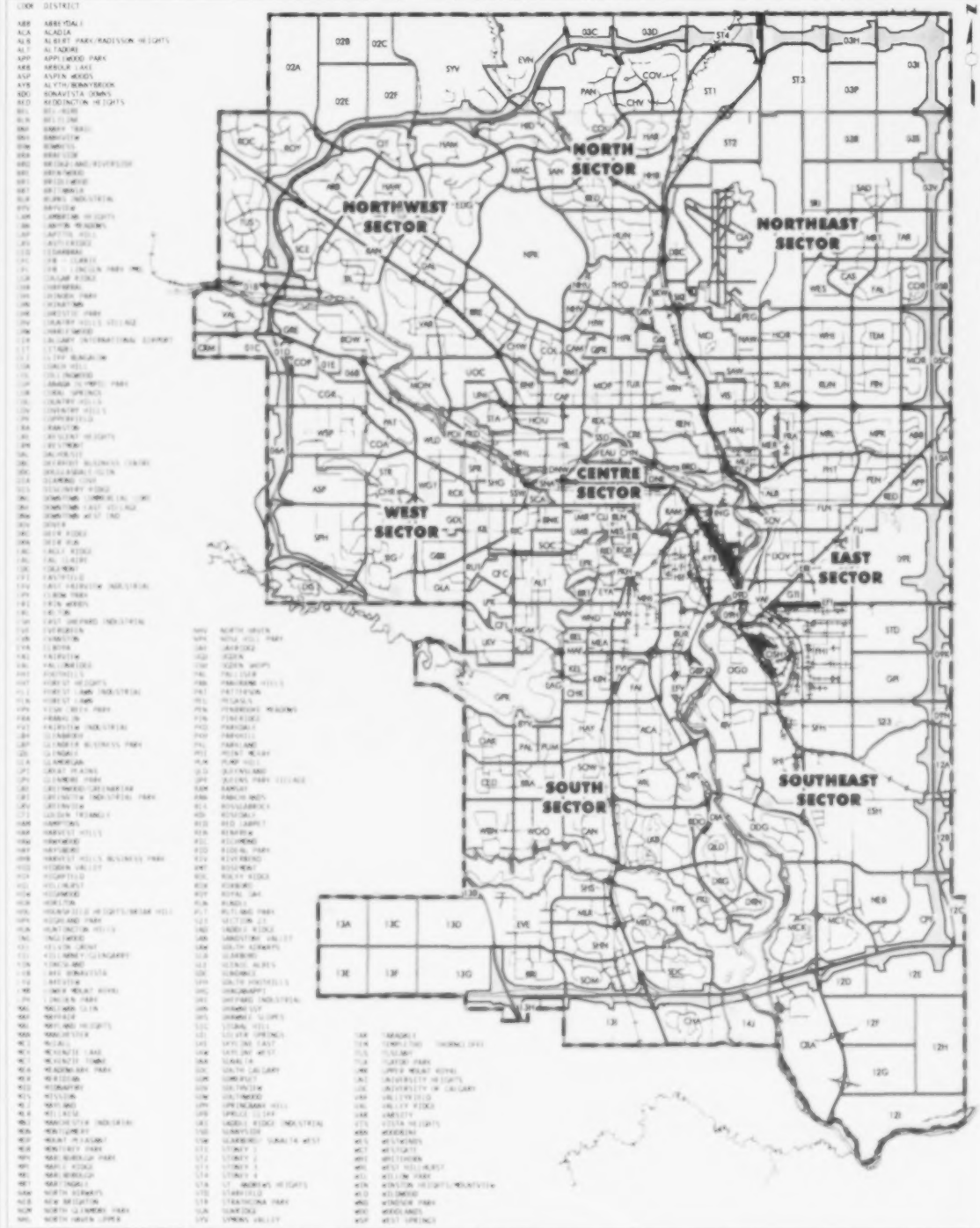

SUBURBAN SECTORS AND COMMUNITY DISTRICTS OF CALGARY - 2004

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

CITY-WIDE
MAP 1

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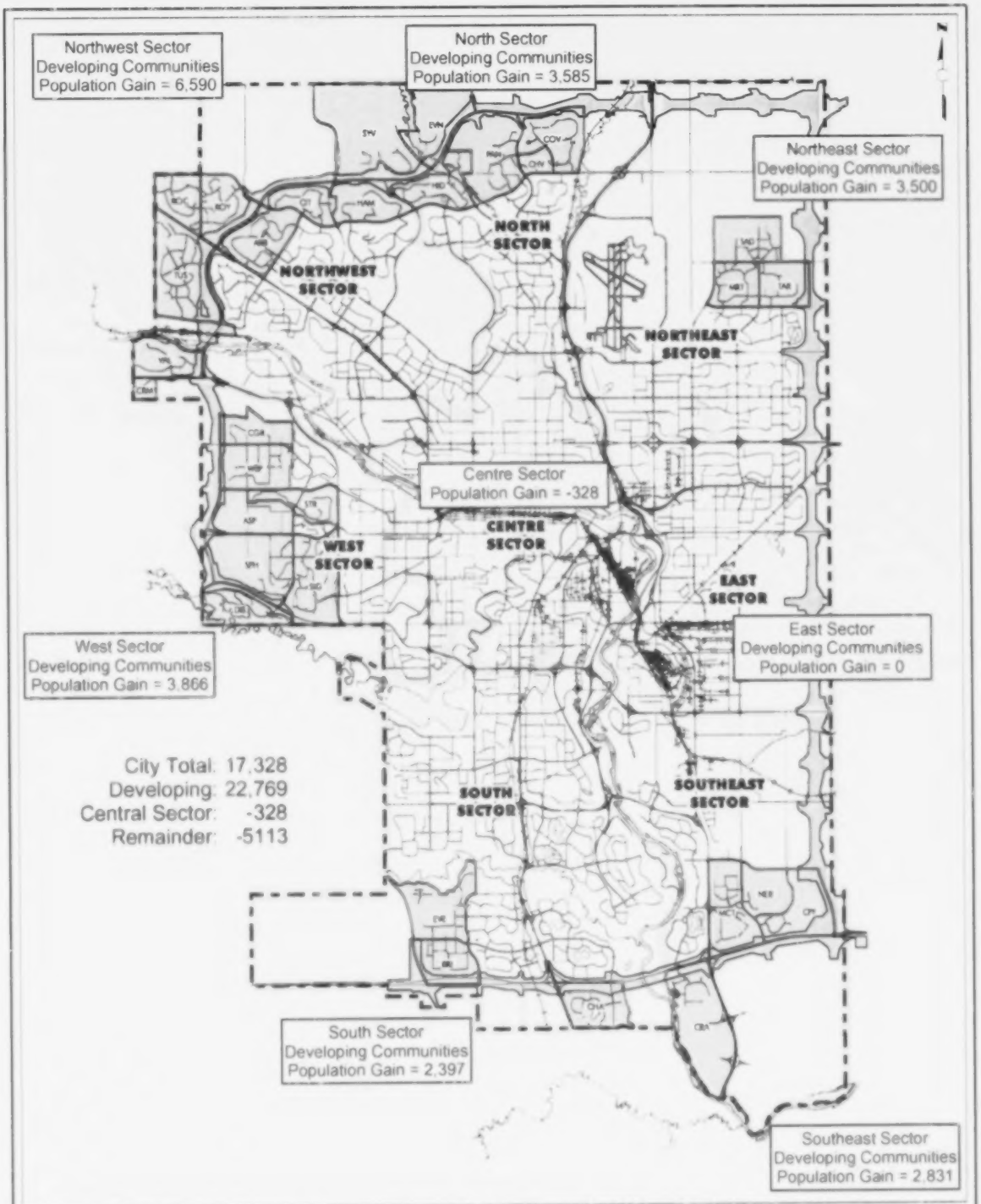


GROWTH IN DEVELOPING COMMUNITIES 2002-2003

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

CITY-WIDE
MAP 2

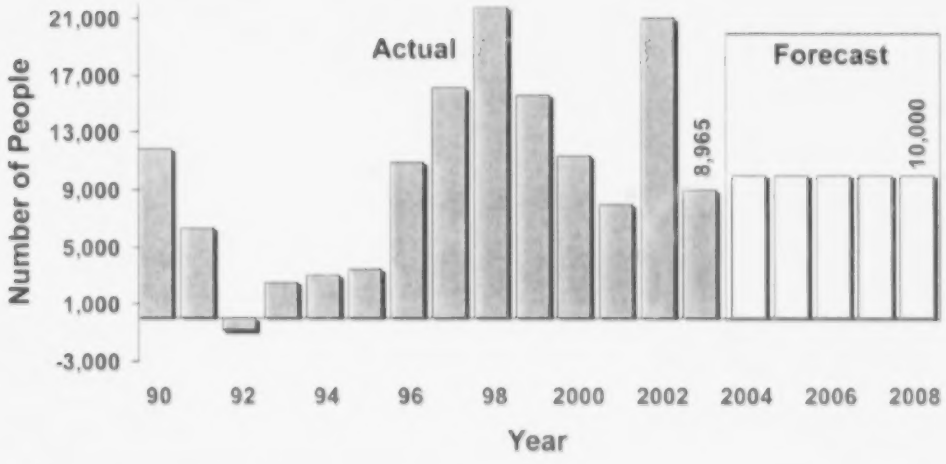
POPULATION

Figure 1 Short-Term Population Projections (2004-2008)

Year	Projected Net Migration	Projected Natural Increase	Projected Population
2003 (Actual)	8,965	8,365	922,315
2004	10,000	8,400	942,000
2005	10,000	8,500	960,000
2006	10,000	8,600	979,000
2007	10,000	8,700	997,000
2008	10,000	8,800	1,016,000
Total 2004-2008	50,000	43,000	93,685

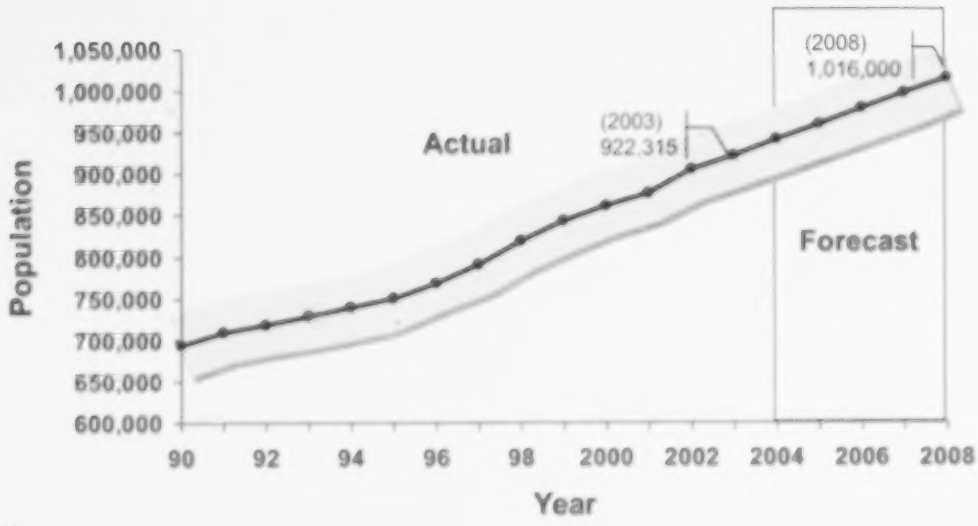
Source: Civic Census & Corporate Studies & Economics, 2003

Figure 2 Annual Net Migration for Calgary, Actual (1990-2003) and Forecast (2004-2008)



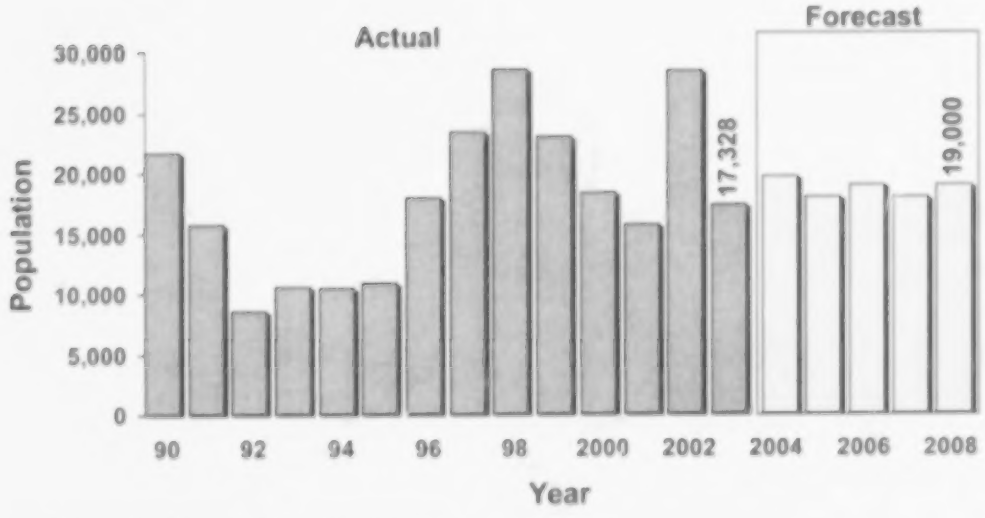
Source: Civic Census & Corporate Studies & Economics, 2003

Figure 3 Recent and Forecast Population Growth for Calgary (1990-2008)



Source: Civic Census & Corporate Studies & Economics, 2003

Figure 4 Annual Population Growth, Actual (1990-2002) and Forecast (2004-2008)



Source: Civic Census & Corporate Studies & Economics, 2003

CAPACITY

Figure 5 Distribution of Vacant Serviced Lots by Sector (2002, 2003, 2004)

	2002		2003		2004	
Sector	Vacant Lots	%	Vacant Lots	%	Vacant Lots	%
North	907	11%	951	10%	1,759	19%
Northeast	1,049	13%	1,337	14%	762	8%
East	0	0%	0	0%	0	0%
Southeast	967	12%	1,465	16%	1,877	20%
South	1,009	12%	1,282	14%	1,225	13%
West	2,131	26%	1,720	19%	1,509	16%
Northwest	2,083	26%	2,492	27%	2,036	22%
Total Suburbs	8,146	100%	9,247	100%	9,168	100%

Source: Urban Development Institute (U.D.I.) Survey, January 2002, 2003, 2004

Figure 6 Vacant Lot Survey, Enmax and The Urban Development Institute (1993-2004)

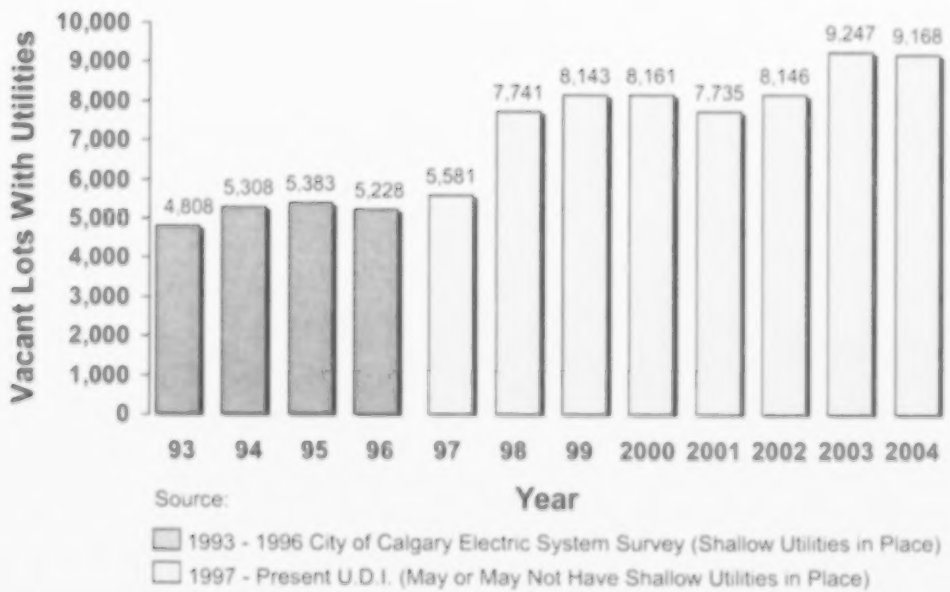


Figure 7 Estimated Supply of Approved Single, Semi-Detached and Multi-Units in Suburban Areas by Sector (2002 and 2003)

Single, Semi Detached & Multi Unit (apartment & row)

2003 (April)

Sector	Single/Semi Under Construction	Multi Unit Under Construction	Vacant Single/Semi	% Vacant of Single/Semi	Vacant Multi Unit	Vacant Total Units	% Vacant Total Units
North	498	188	1,471	14%	1,225	2,896	20%
Northeast	409	0	1,164	11%	443	1,607	12%
East	0	0	0	0%	0	0	0%
Southeast	541	0	1,067	10%	180	1,247	9%
South	278	0	1,359	13%	0	1,359	10%
West	635	0	2,721	25%	117	2,838	21%
Northwest	734	449	2,983	28%	614	3,597	27%
Total	3,095	637	10,765	100%	2,579	13,344	100%

Estimates included registered lots and associated units in approved Tentative Plans.

Under construction units is based upon Civic Census information.

Percentage numbers may not add due to rounding.

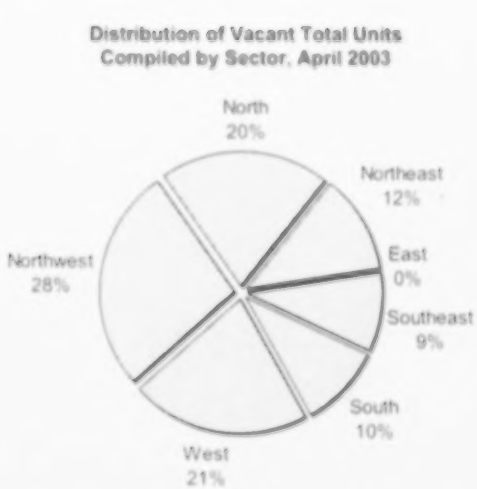
Single, Semi Detached & Multi Unit (apartment & row)

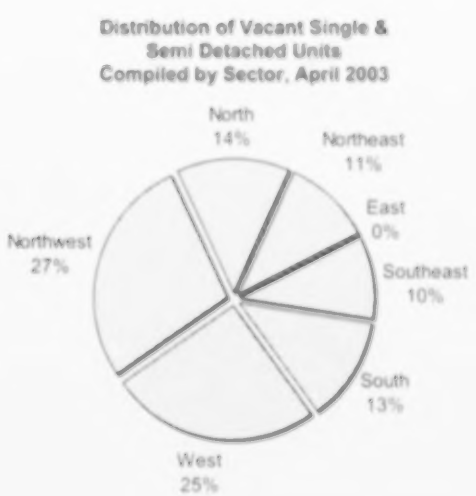
2002 (April)

Sector	Single/Semi Under Construction	Multi Unit Under Construction	Vacant Single/Semi	% Vacant of Single/Semi	Vacant Multi Unit	Vacant Total Units	% Vacant Total Units
North	336	125	2,138	20%	1,411	3,549	24%
Northeast	664	64	1,727	16%	395	2,122	14%
East	0	0	0	0%	0	0	0%
Southeast	264	129	1,784	17%	550	2,334	16%
South	407	120	1,365	13%	156	1,511	10%
West	532	138	2,054	19%	258	2,312	16%
Northwest	1,095	43	1,715	16%	1,302	3,017	20%
Total	3,298	639	10,773	100%	4,072	14,845	100%

Source: City of Calgary, Planning Development & Assessment

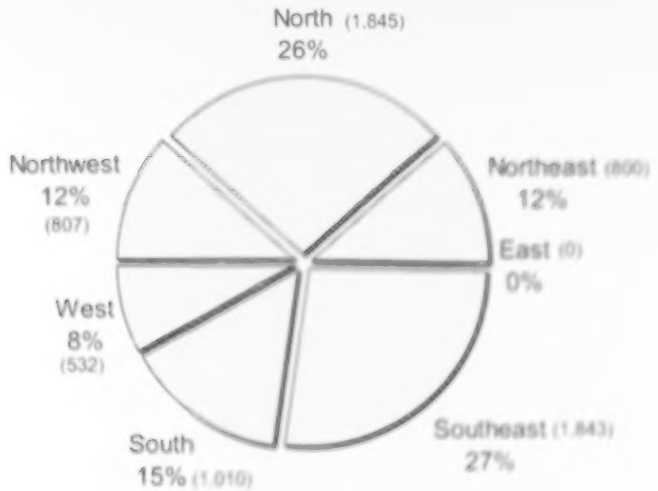
Figure 8 Distribution of Vacant Units Compiled by Sector (April 2003)





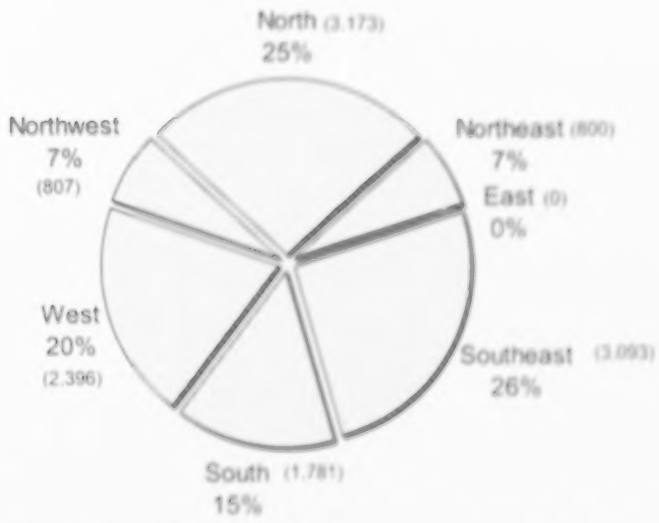
Source: City of Calgary, Planning, Development & Assessment

Figure 9 **Distribution of Unsubdivided Residential Land Supply Considered "Fully Serviced" by Sector in Acres (April 2003)**



Source: City of Calgary, Planning, Development & Assessment

Figure 10 **Distribution of Unsubdivided Residential Land Supply by Sector in Acres (April 2003)**



Source: City of Calgary, Planning, Development & Assessment

Figure 11 Estimated Supply of the Unsubdivided Residential Land Supply by Sector in Gross Residential Acres (April 2002)

Gross Residential Acres

Sector	Fully Serviced	Partially Serviced	Unserviced	Total Supply
North	1,845	1,269	59	3,173
Northeast	800	0	0	800
East	0	0	0	0
Southeast	1,043	667	553	3,093
South	1,010	304	467	1,781
West	532	1,864	0	2,396
Northwest	607	0	0	607
Total	6,835 Acres	4,104 Acres	1,109 Acres	12,048 Acres

Unit Capacity

Sector	Fully Serviced	Partially Serviced	Unserviced	Total Supply
North	14,641	8,503	449	23,592
Northeast	5,491	0	0	5,491
East	0	0	0	0
Southeast	14,359	4,757	4,095	23,211
South	9,453	1,740	2,906	14,099
West	3,794	9,766	0	13,560
Northwest	5,451	0	0	5,451
Total	52,189 Units	24,766 Units	8,449 Units	85,404 Units

Notes:

"Fully Serviced" - represents lands that have utility capacity in place (both water and sewer) in place.

"Partially Serviced" - represents lands that have some utility capacity in place (water or sewer but not both).

"Unserviced" - represents lands that have no utility capacity in place (no water or sewer in place).

This inventory includes sites identified for multi-family uses in existing Outline Plans (420 acres). The inventory excludes areas of land for which land use policy and/or servicing information is not yet available.

Source: Planning Development & Assessment, 2004

Unsubdivided Residential Land Supply (as of April 2003)

Fully Serviced
(Both Water and Sewer in Place)

Partially Serviced
(Water or Sewer, But Not Both)

Unserviced
(No Water or Sewer in Place)

Subject To Review
(Will Include Residential And Non Residential Uses)

Sector Boundary

Transportation Utility Corridor

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

CITY-WIDE
MAP 3

Figure 12 **Estimated Development Potential of Vacant Residential Land with Land Use Approval (April 2003)**

City Sector and Community	Serviced Land With Land Use (Subdivided Land)					Serviced Land With Land Use (Unsubdivided Land)					Total Supply With Land Use					Unserviced Land With Land Use (Unsubdivided Land)				Total Supply With Land Use Total			
	Single Detached Units	Block Units	Total Units	Acres at Type	Single Detached Units	Block Units	Total Acres	Total Units	Single Detached Units	Block Units	Total Acres	Total Units	Single Detached Units	Block Units	Total Acres	Population Capacity	Single Detached Units	Block Units	Total Acres	Total Units	Population Capacity	Total Acres
NE or SUBURBS TOTAL BY SECTION																						
NORTHEAST	1,764	443	1,807	218	785	727	8	1,512	2,549	1,170	226	3,719	4,313	1,613	444	10,111	1,290	0	70	1,290	2,367	514
SOUTHEAST	1,067	180	1,247	178	1,883	859	2,206	83	360	2,950	1,039	3,989	6,950	2,678	1,139	27,250	2,934	410	1,344	12,349	35,780	1,544
SOUTH	1,721	50	1,771	253	1,786	379	1,578	69	345	4,507	1,828	841	6,228	2,207	1,194	17,750	686	61	1,747	6,819	19,770	902
NE or SUBURBS TOTAL	10,743	2,332	12,277	1,887	25,179	4,653	10,607	522	6,475	35,143	13,429	6,372	143,136	1,712	686	83,884	153,900	6,870				
	Units	Units	Units	Acres	Units	Acres	Units	Acres	Acres	Units	Units	Acres	People	Units	Acres	Units	People	Acres				

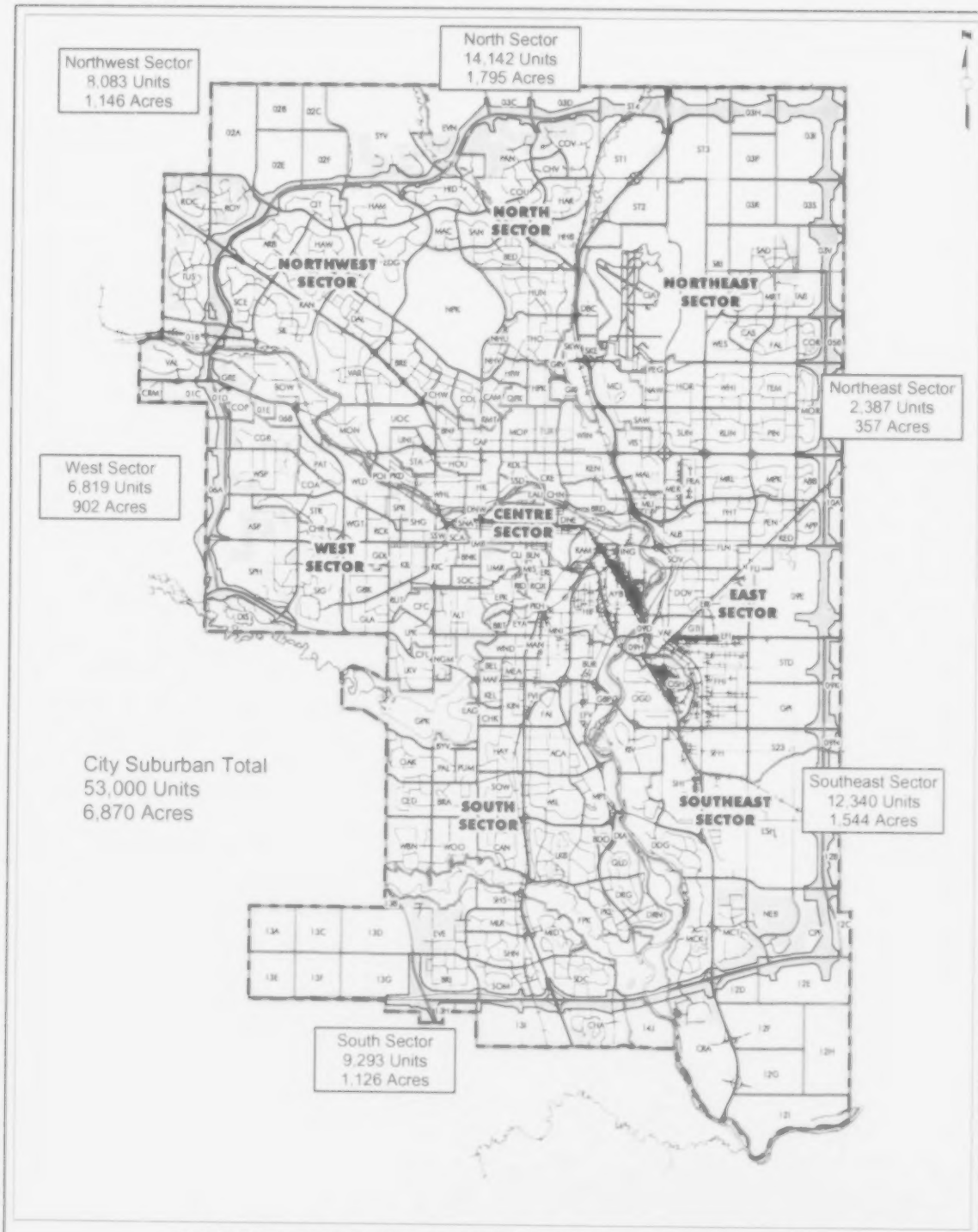
Note: Population Capacity = Units multiplied by 2.9 people per unit

* Servicing Status is based upon deficiencies in the Short Term Growth Management Strategy Monitoring Report.

Serviced lands are areas where service capacity is available (i.e. water and sewer mains and roadways). Meaning that capacity on the utility system exists to accommodate development without requiring significant City expenditures for major trunks, watermains, reservoirs, etc.

'Calculated' Density is based upon an assumed density of 7.0 units per acre where actual remaining densities are not yet built.

'Planned Density' is based upon actual approved outline plans and Ridgemont Estates of Approved Community Plans



VACANT RESIDENTIAL WITH LAND USE APPROVAL
APRIL 2003

THE CITY OF CALGARY | Suburban Residential Growth Information Update 2004-2008 | CITY-WIDE MAP 4

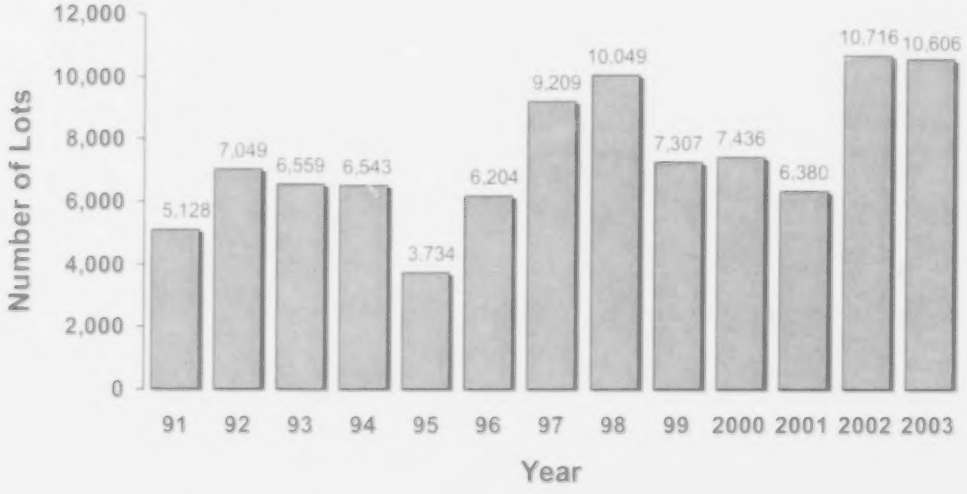
HOUSING AND LAND

Figure 13 Residential Subdivison Activity, Tentative Plan Approvals, Number of Lots (1999 to 2003)

Tentative Plan Approvals Number of Lots	1999	2000	2001	2002	2003	Total
Single Family	6,088	4,784	4,875	8,305	8,086	32,138
Two Family (Semi Detached)	214	508	451	445	467	2,085
Other Multi Unit	114	199	41	229	96	679
Bareland Condominium	668	643	331	232	202	2,076
Total	**7,084**	**6,134**	**5,698**	**9,211**	**8,851**	**36,978**

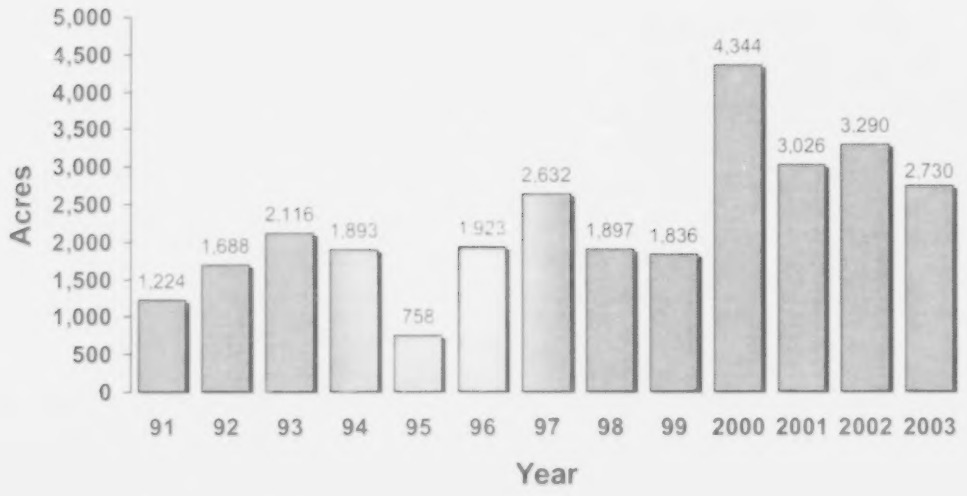
Source: City of Calgary, Planning, Development & Assessment

Figure 14 Tentative Plan Applications, Number of Lots (1991-2003)



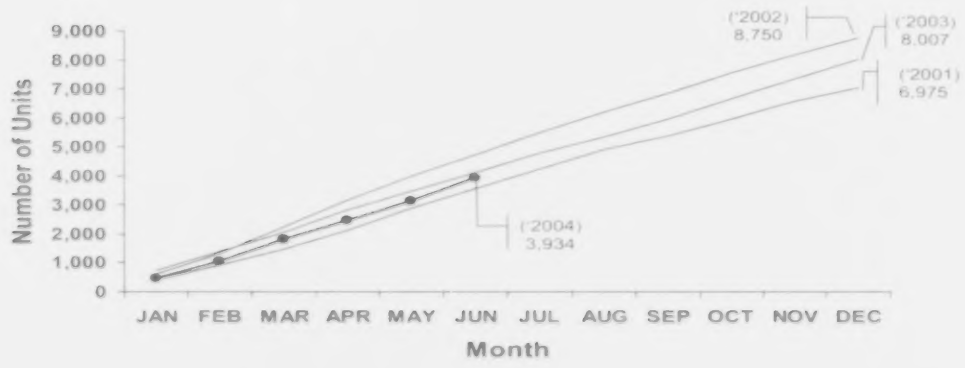
Source: City of Calgary, Planning, Development & Assessment

Figure 15 Outline Plan Applications, Number of Acres (1991-2003)



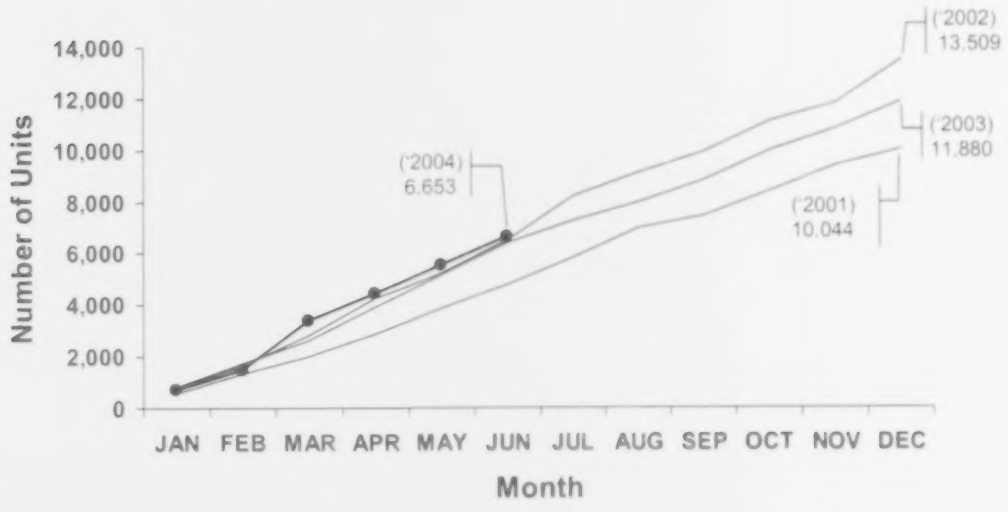
Source: City of Calgary, Planning, Development & Assessment

Figure 16 Cumulative Single / Semi-Detached by Building Permit Applications (2001, 2002, 2003, 2004 year to date)



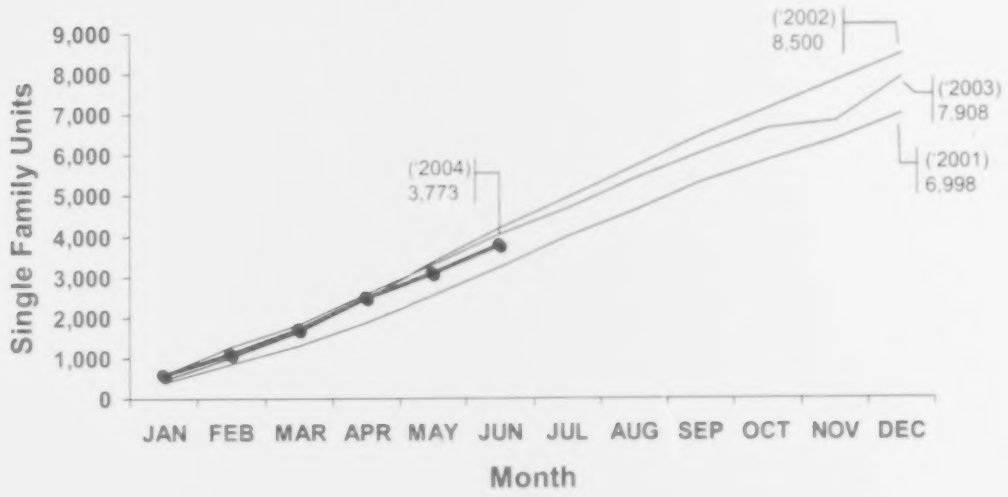
Source: City of Calgary, Planning Development & Assessment

Figure 17 Cumulative Total Units by Building Permit Applications (2001, 2002, 2003 and 2004 year to date)



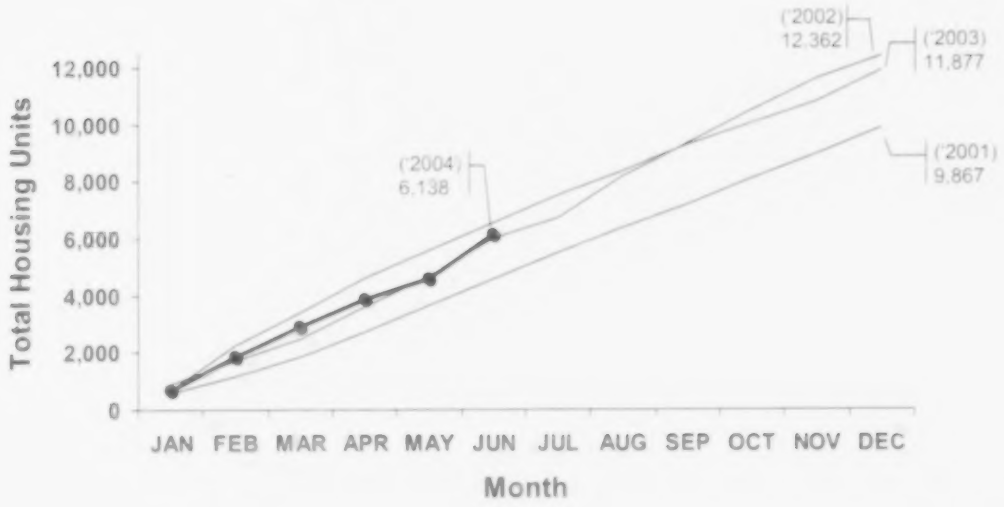
Source: City of Calgary, Planning Development & Assessment

Figure 18 Cumulative Single / Semi-Detached Starts by Month (2001, 2002, 2003, 2004 year to date)



Source: Canada Mortgage and Housing Corporation

Figure 19 Cumulative Total Housing Starts by Month (2001, 2002, 2003, 2004 year to date)



ource: Canada Mortgage and Housing Corporation

Figure 20 Forecast Population and Housing Growth 2004 to 2008 City-Wide Unit Forecasts for Single, Semi-Detached and Multi-Unit

Year	Population	Single and Semi Detached Units	Multi Units	Total City Wide Acres of Residential Land Required @ 8 U.P.A.*	**@ 7.0 U.P.A.***	@ 6 U.P.A.*
2003 Actual	922,315	8,145	2,953	1,390	1,590	1,850
2004	19,685	6,800	2,300	1,140	1,300	1,520
2005	18,000	6,300	2,800	1,140	1,300	1,520
2006	19,000	6,300	2,700	1,130	1,290	1,500
2007	18,000	6,200	2,700	1,110	1,270	1,480
2008	19,000	6,200	2,700	1,110	1,270	1,480
2004-2008	93,685 People added	31,800 Units added	13,200 Units added	5,630 Acres	**6,430 Acres**	7,500 Acres

* Units Per Acre Gross Residential Density

* Acres of Approximate land need for Total City Wide unit growth

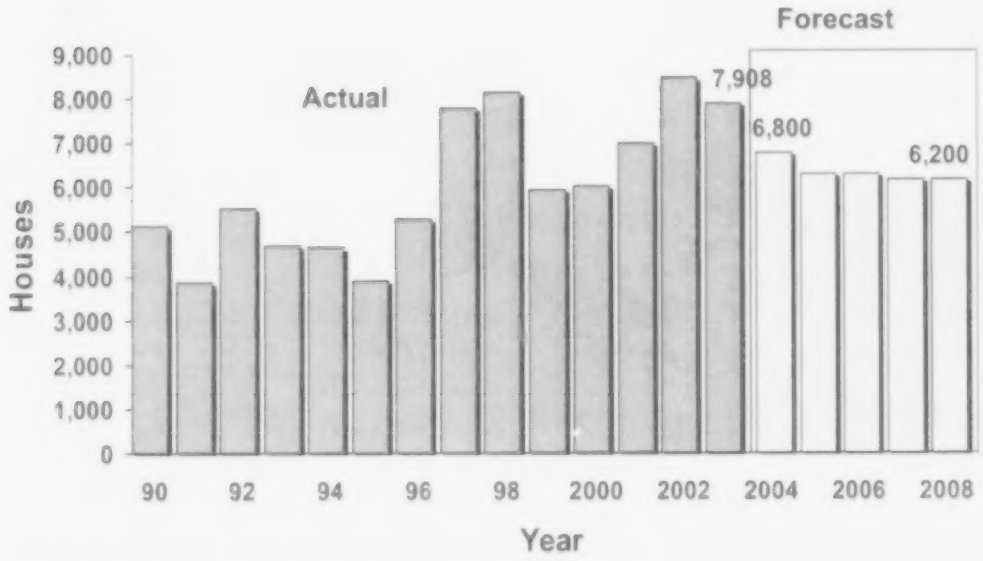
* The Calgary Plan promotes a 6 to 8 units per acre density for new suburban community growth

Multi Family includes Apartment and Townhouse Units

Source: Civic Census, 2003

Corporate Studies & Economics/Planning, Development & Assessment, 2004

Figure 21 Single and Semi-Detached Housing Starts Actual (1990-2003) and Forecast (2004-2008)



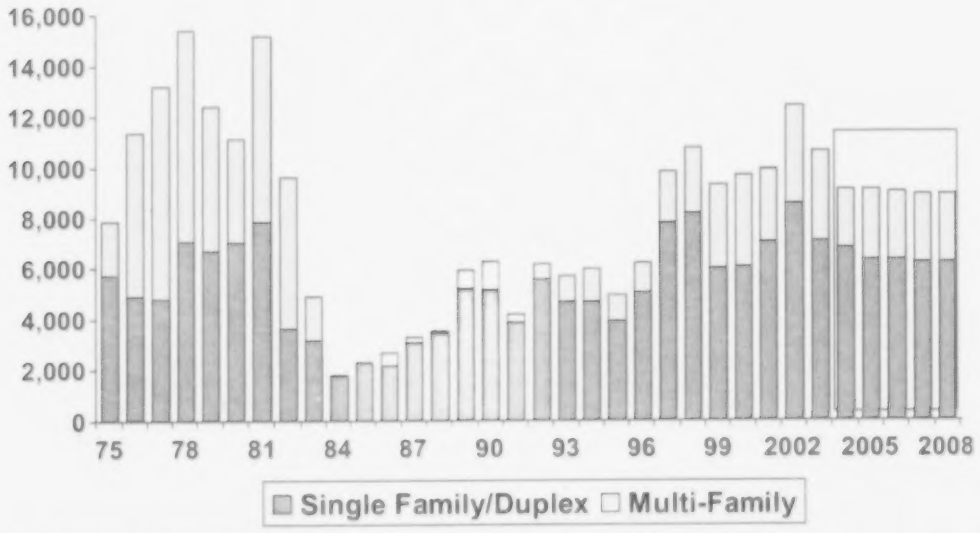
Source: Canada Mortgage and Housing Corporation & Corporate Studies & Economics

Figure 22 Calgary Housing Starts 1999 to 2003

Year	Single Unit	Semi Detached	Row	Apartment	Total	Total Single & Semi	Total Multi-Unit	% Multi Unit
1999	5,524	430	508	2,791	9,253	5,954	3,299	36%
2000	5,628	408	644	2,968	9,648	6,036	3,612	37%
2001	6,474	524	870	1,999	9,867	6,998	2,869	29%
2002	7,952	548	945	2,917	12,362	8,500	3,862	31%
2003	7,300	608	1,092	2,877	11,877	7,908	3,969	33%
Five Year Average	6,576 Units	504 Units	812 Units	2,710 Units	10,601 Units	7,079 **Units**	3,522 **Units**	33%

Source: Canada Mortgage and Housing Corporation (C.M.H.C.), 2003 December

Figure 23 **Calgary Housing Starts, Single, Semi-Detached and Multi-Unit (Actual 1975-2003) and Forecast (2004-2008)**



Source: Canada Mortgage and Housing Corporation; City of Calgary, Planning, Development & Assessement

Figure 24 **Market Share Distribution of New Suburban Housing by Sector, Full Sector Totals 1999 to 2003**

Sector	Single & Semi Detached 1999	2000	2001	2002	2003	Average Share 1999 - 2003
North	17%	14%	13%	16%	19%	16%
Northeast	13%	16%	16%	13%	12%	14%
East	1%	0%	0%	0%	0%	0%
Southeast	11%	9%	10%	13%	16%	12%
South	18%	18%	16%	15%	15%	16%
West	10%	15%	17%	20%	19%	16%
Northwest	29%	28%	27%	23%	19%	25%
Suburban Total	100%	100%	100%	100%	100%	100%

Sector	Multi Unit 1999	2000	2001	2002	2003	Average Share 1999 - 2003
North	16%	8%	3%	13%	19%	12%
Northeast	7%	6%	11%	13%	0%	7%
East	13%	6%	0%	16%	11%	9%
Southeast	3%	15%	3%	9%	14%	9%
South	28%	26%	25%	12%	22%	23%
West	13%	18%	25%	13%	15%	17%
Northwest	19%	21%	33%	24%	20%	23%
Suburban Total	100%	100%	100%	100%	100%	100%

* Multi-unit includes, apartments and row housing note these are city wide totals

Source: City of Calgary Planning, Development & Assessment
information is based upon Building Permit Applications (New Units Added)

BUILDING PERMIT APPLICATIONS FOR NEW SINGLE UNIT HOMES - 2003

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

CITY-WIDE
MAP 5

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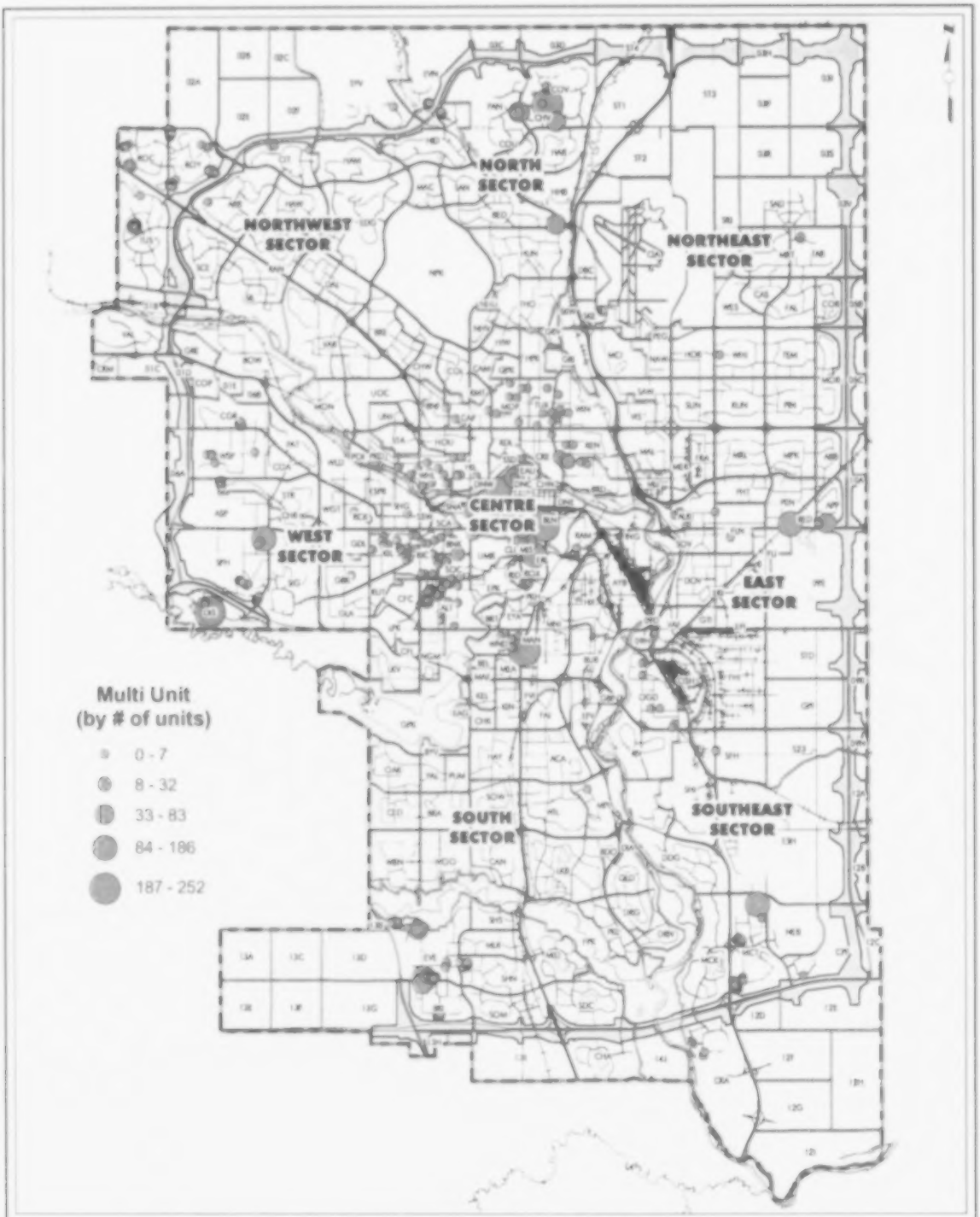

BUILDING PERMIT APPLICATIONS
FOR NEW MULTI UNITS - 2003 (Townhouses and Apartments)

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

CITY-WIDE
MAP 6

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Figure 25 Multi-Unit Building Permit Comparisons, by New Units Added 1999 to 2003, Full Sector vs. Developing Communities

Multi Unit Comparisons - By Suburban Sectors

Multi-unit includes semi detached, apartments and row housing New Units Added	1999	2000	2001	2002	2003	Average Share 1999 - 2003
Suburban Sectors	2,163	2,857	2,009	4,186	3,099	**64%**
Central Sector	1,370	1,912	1,338	1,893	1,469	36%
City Total	3,533	4,769	3,347	6,079	4,568	100%

Multi Unit Comparisons - By Developing Communities

Multi-unit includes semi-detached, apartments and row housing New Units Added	1999	2000	2001	2002	2003	Average Share 1999-2003
Developing Communities	1,301	1,963	1,423	2,608	2,589	**44%**
Remainder of City	2,232	2,806	1,924	3,471	1,979	56%
City Total	3,533	4,769	3,347	6,079	4,568	100%

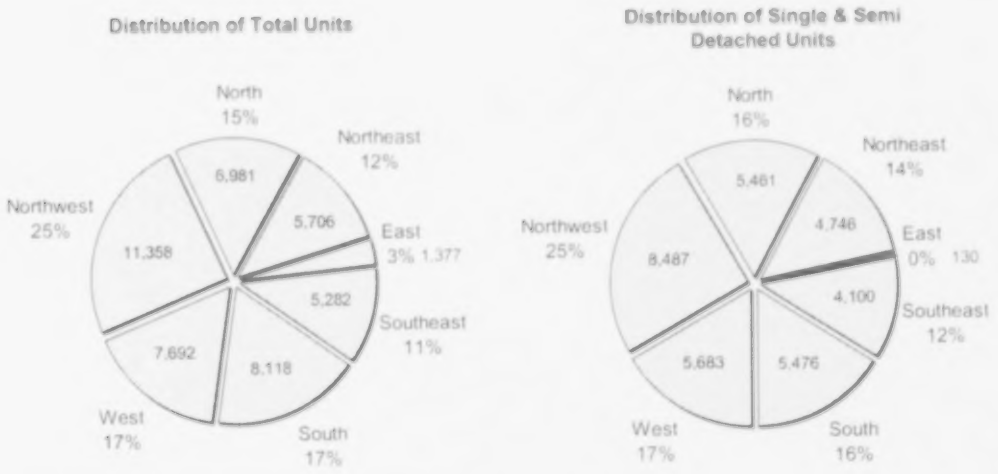
Multi Unit Comparisons - By Developing Communities

Multi-unit includes apartments and row housing New Units Added	1999	2000	2001	2002	2003	Average Share 1999 - 2003
Developing Communities	1,149	1,747	1,162	2,227	2,256	**43%**
Remainder of City	2,085	2,634	1,755	3,277	1,688	57%
City Total	3,234	4,381	2,917	5,504	3,944	100%

Numbers may not add due to rounding

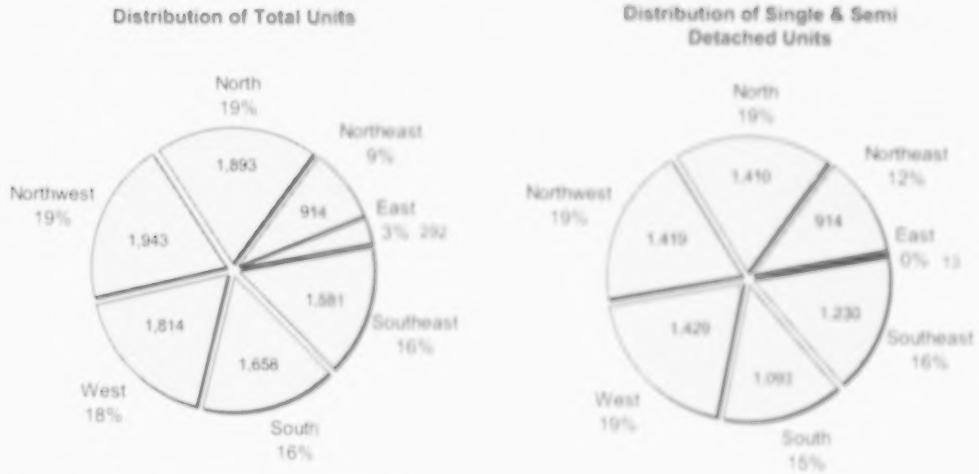
Source: Planning, Development & Assessment, City of Calgary, 2004
Information is based upon Building Permit Applications New Units Added

Figure 26 Historical Market Share of New Units by Sector, All Communities, Full Sector (1999-2003)



Source: City of Calgary, Planning Development & Assessment

Figure 27 Historical Market Share of New Units by Sector, All Communities, Full Sector (2003)



Source: City of Calgary, Planning, Development & Assessment

Figure 28 Historical Market Share of New Units by Sector, All Communities, Full Sector (2003)

Suburban Sectors *All Communities*	Single & Semi Detached (Units) Single	Semi	Total	% of Suburbs	Multi-Unit (Units) Row	Apart	Total	% of Suburbs	All Units Total	% of City
North	1,348	62	1,410	**18.8%**	114	369	483	**18.7%**	1,893	**16%**
%	71%	3%	74%		6%	19%	26%		100%	
Northeast	904	10	914	**12.2%**	0	0	0	**0.0%**	914	**8%**
%	99%	1%	100%		0%	0%	0%		100%	
East	4	9	13	**0.2%**	10	269	279	**10.8%**	292	**2%**
%	1%	3%	4%		3%	92%	96%		100%	
Southeast	1,145	85	1,230	**16.4%**	141	210	351	**13.6%**	1,581	**13%**
%	72%	5%	78%		9%	13%	22%		100%	
South	1,021	72	1,093	**14.6%**	121	444	565	**21.8%**	1,658	**14%**
%	62%	4%	66%		7%	27%	34%		100%	
West	1,287	142	1,429	**19.0%**	56	329	385	**14.9%**	1,814	**15%**
%	71%	8%	79%		3%	18%	21%		100%	
Northwest	1,364	55	1,419	**18.9%**	441	83	524	**20.3%**	1,943	**16%**
%	70%	3%	73%		23%	4%	27%		100%	
	How much went to the Suburban Sectors									
Suburban Total	7,073	435	7,508	**94%**	883	1,704	2,587	**66%**	10,095	**85%**
%	70%	4%	74%		9%	17%	26%		100%	
	How much went to the Central Sector									
Central Sector	270	189	459	**6%**	161	1,196	1,357	**34%**	1,816	**15%**
%	15%	10%	25%		9%	66%	75%		100%	
City Total	7,343	624	7,967	**100%**	1,044	2,900	3,944	**100%**	11,911	**100%**
%	62%	5%	67%		9%	24%	33%		100%	

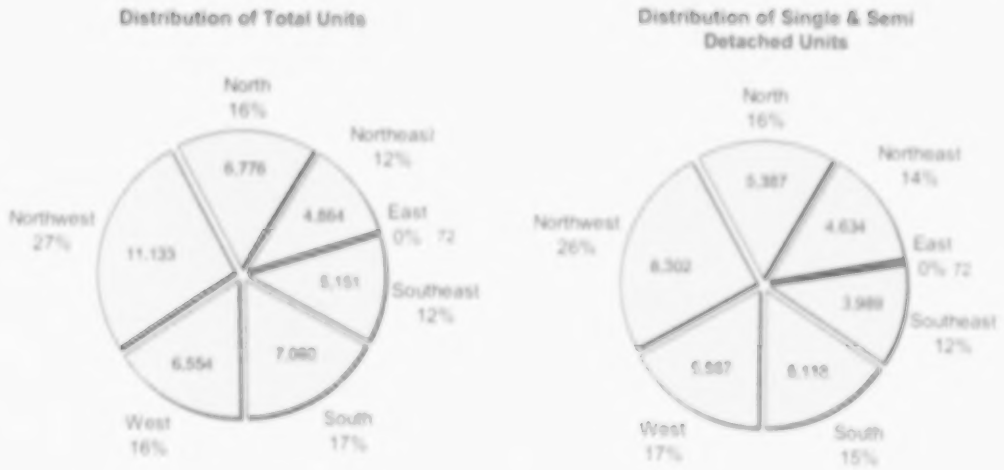
Source: City of Calgary, Planning, Development & Assessment

Notes: This table reflects the number of Units applied for and not the number of applications. (each multi-unit project may have a number of units but only one application)

The table includes applications for new buildings only, and does not include applications to created units through additions or renovations to existing buildings

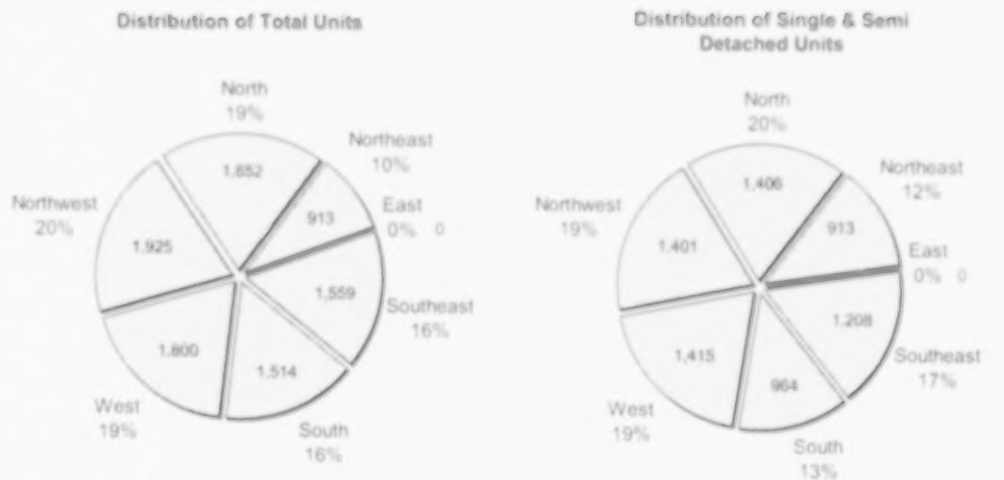
Numbers may not add due to rounding

Figure 29 **Historical Market Share of New Units by Sector, Developing Communities (1999-2003)**



Source: City of Calgary, Planning, Development & Assessment

Figure 30 **Historical Market Share of New Units by Sector, Developing Communities (2003)**



Source: City of Calgary, Planning, Development & Assessment

Figure 31 Historical Market Share of New Units by Sector, Developing Communities (2003)

Suburban Sectors Developing Communities Only	Single &Semi Detached (Units)				Multi-Unit (Units)				All Units	
	Single	Semi	Total	% of Developing Communities	Row	Apart	Total	% of Developing Communities	Total	% of City
North	1,345	61	1,406	**19.2%**	114	332	446	**19.8%**	1,952	**16%**
%	73%	3%	76%		6%	18%	24%		100%	
Northeast	903	10	913	**12.5%**	0	0	0	**0.0%**	913	**8%**
%	99%	1%	100%		0%	0%	0%		100%	
East	0	0	0	**0.0%**	0	0	0	**0.0%**	0	**0%**
%	0%	0%	0%		0%	0%	0%		0%	
Southeast	1,137	71	1,208	**16.5%**	141	210	351	**15.6%**	1,559	**13%**
%	73%	5%	77%		9%	13%	23%		100%	
South	964	0	964	**13.2%**	109	441	550	**24.4%**	1,514	**13%**
%	64%	0%	64%		7%	29%	36%		100%	
West	1,279	136	1,415	**19.4%**	56	329	385	**17.1%**	1,800	**15%**
%	71%	8%	79%		3%	18%	21%		100%	
Northwest	1,345	55	1,401	**19.2%**	441	83	524	**23.2%**	1,925	**16%**
%	70%	3%	73%		23%	4%	27%		100%	
Developing Communities Total	How much went to the Developing Communities:									
	6,974	333	7,307	**92%**	861	1,395	2,256	**57%**	9,563	**80%**
%	73%	3%	76%		9%	15%	24%		100%	
Remainder of City	How much went to the Remainder of the City:									
	369	291	660	**8%**	183	1,505	1,688	**43%**	2,348	**20%**
%	16%	12%	28%		8%	64%	72%		100%	
City Total	7,343	624	7,967	**100%**	1,044	2,900	3,944	**100%**	11,911	**100%**
%	62%	5%	67%		9%	24%	33%		100%	

Source: City of Calgary, Planning, Development & Assessment

Notes: This table reflects the number of Units applied for and not the number of applications. (each multi-unit project may have a number of units but only one application).

The table includes applications for new buildings only, and does not include applications to created units through additions or renovations to existing buildings.

Numbers may not add due to rounding

Figure 32 Units Associated with Building Permit Applications, in the Developing Communities by Community and Sector (Units Added 2003)

January 1 to December 31, 2003 Suburban Sectors *Developing Communities Only*	Single & Semi Detached (Units)				Multi-Unit (Units)				All Units			Top Ten
	Single	Semi	Total	% of all Dev. Com.	Row	Apart.	Total	% of all Dev. Com.	Total	% of Dev. Com.	% of City Sector	
North												
Country Hills Village	0	0	0		0	296	296		296		16%	
Coventry Hill	437	33	470		0	0	0		470		25%	7
Evanston	287	26	313		0	0	0		313		17%	
Hidden Valley	70	0	70		24	0	24		94		5%	
Panorama Hills	343	0	343		90	36	126		469		25%	8
Symons Valley	208	2	210		0	0	0		210		11%	
Developing Communities Total	**1,345**	**61**	**1,406**	**19%**	**114**	**332**	**446**	**20%**	**1,852**	**18%**	**18%**	
% of all Units for the sector	73%	3%	76%		6%	18%	24%		100%		% of City	
Northeast												
Martindale	76	0	76		0	0	0		76		8%	
Saddlerdge	351	0	351		0	0	0		351		38%	
Taradale	476	10	486		0	0	0		486		53%	5
Developing Communities Total	**903**	**10**	**913**	**13%**	**0**	**0**	**0**	**0%**	**913**	**18%**	**6%**	
% of all Units	99%	1%	100%		0%	0%	0%		100%		% of City	
Southeast												
Copperfield	295	0	295		82	0	82		377		24%	9
Cranston	310	4	314		0	0	0		314		20%	
Mckenzie Towne	354	67	421		59	210	269		690		44%	3
New Brighton	178	0	178		0	0	0		178		11%	
Developing Communities Total	**1,137**	**71**	**1,208**	**17%**	**141**	**210**	**351**	**16%**	**1,559**	**16%**	**13%**	
% of all Units	73%	5%	77%		9%	13%	23%		100%		% of City	
South												
Bridlewood	156	0	156		39	150	188		344		23%	
Chaparral	204	0	204		0	0	0		204		13%	
Evergreen	604	0	604		71	291	362		966		64%	1
Developing Communities Total	**964**	**0**	**964**	**13%**	**100**	**441**	**550**	**24.4%**	**1,514**	**16%**	**13%**	
% of all Units	64%	0%	64%		7%	29%	36%		100%		% of City	
West												
Aspen Woods	66	0	66		0	0	0		66		4%	
Cougar Ridge	319	4	323		44	0	44		367		20%	10
Crestmont	60	0	60		0	0	0		60		3%	
Discovery Ridge	134	11	145		0	207	207		352		20%	
Signal Hill	47	0	47		0	0	0		47		3%	
Springbank Hill	291	56	347		12	122	134		481		27%	6
Strathcona	26	40	66		0	0	0		66		4%	
West Springs	336	25	361		0	0	0		361		20%	
Developing Communities Total	**1,279**	**136**	**1,415**	**18%**	**56**	**329**	**385**	**17.1%**	**1,800**	**19%**	**15%**	
% of all Units	71%	8%	79%		3%	18%	21%		100%		% of City	
Northwest												
Arbour Lake	42	0	42		0	41	41		83		4%	
Citadel	29	2	31		44	0	44		75		4%	
Hamptons	51	0	51		0	0	0		51		3%	
Rocky Ridge	141	13	154		95	0	95		249		13%	
Royal Oak	453	38	491		199	42	241		732		38%	2
Tuscany	549	2	551		103	0	103		654		34%	4
Valley Ridge	81	0	81		0	0	0		81		4%	
Developing Communities Total	**1,346**	**55**	**1,401**	**18%**	**441**	**83**	**524**	**23.2%**	**1,925**	**20%**	**16%**	
% of all Units	70%	3%	73%		23%	4%	27%		100%		% of City	
Developing Communities Total	How much went to the Developing Communities? 6,974	333	7,307	**92%**	861	1,896	2,256	**57%**	9,561		**80%**	
% of all Units	73%	3%	76%		9%	15%	24%		100%			
Remainder of City	How much went to the Remainder of the City 369	291	660	**8%**	183	1,505	1,688	**43%**	2,348		**20%**	
% of all Units	16%	12%	28%		8%	64%	72%		100%			
City Total	7,343	624	7,967	**100%**	1,044	2,900	3,944	**100%**	11,911		**100%**	
% of all Units	62%	5%	67%		9%	24%	33%		100%			

Notes: This table reflects the number of Units applied for and not the number of applications, (each multi-unit project may have a number of units but only one application). The table includes applications for new buildings only, and does not include applications to created units through additions or renovations to existing buildings. Numbers may not add due to rounding.

Source: City of Calgary, Planning, Development & Assessment

Figure 33 Historical Growth of Developing Communities by Single and Semi-Detached Units, by Sector (1999-2003)

	City Total (Single Unit, Semi Detached, Row, Apartment)					1999 - 2003
	1999 Units	2000 Units	2001 Units	2002 Units	2003 Units	Total Units
City Total SF/Multi	9,213	10,483	9,965	14,237	11,911	55,809

	City Total (Single Units & Semi Detached)					1999 - 2003
	1999 Units	2000 Units	2001 Units	2002 Units	2003 Units	Total Units
City Total	5,954	6,102	7,048	8,761	7,967	35,832
% of Total City Units	65%	58%	71%	62%	67%	

	Historical Developing Communities Shares (Single Unit & Semi Detached)										1999-2003	Five Year Average 1999-2003	Three Year Average 2001-2003	Two Year Average 2002-2003
	1999		2000		2001		2002		2003					
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	total units	Share (%)	Share (%)	Share (%)
North	18%	978	14%	805	14%	899	16%	1,299	19%	1,406	5,387	16%	16%	18%
Northeast	13%	721	15%	835	16%	1,067	14%	1,098	12%	913	4,634	14%	14%	13%
East	1%	72	0%	0	0%	0	0%	0	0%	0	72	0%	0%	0%
Southeast	11%	625	9%	523	9%	593	13%	1,040	17%	1,208	3,989	12%	13%	15%
South	18%	1,008	17%	974	16%	1,074	14%	1,098	13%	964	5,118	15%	14%	13%
West	10%	567	15%	846	17%	1,118	20%	1,621	19%	1,415	5,567	17%	19%	20%
Northwest	29%	1,602	29%	1,610	27%	1,784	24%	1,905	19%	1,401	8,302	25%	23%	22%
Total	100%	5,573	100%	5,593	100%	6,535	100%	8,061	100%	7,307	33,069	100%	100%	100%
Percentage to Developing Communities		94%		92%		93%		92%		92%		92%	92%	92%

Five year average number of units to the Developing Communities = 6,614

On average over the last five years 92% of the total Single and Semi detached units were built in the developing communities of Calgary. This accounted for 6,614 units per year based upon building permits New Units added.

Figure 34 Historical Growth of Developing Communities by Apartment and Townhouse Units, by Sector (1999-2003)

	City Total (Apartment & Townhouse/Row)					
	1999 Units	2000 Units	2001 Units	2002 Units	2003 Units	
City Total	3,259	4,381	2,917	5,476	3,944	
% (Multi) of Total City Units	35%	42%	29%	38%	33%	

	Historical Developing Communities Shares (Apartment & Townhouse/Row)										1999-2003	Five Year Average 1999-2003	Three Year Average 2001-2003	Two Year Average 2002-2003
	1999		2000		2001		2002		2003					
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	total units	Share (%)	Share (%)	Share (%)
North	18%	210	12%	203	4%	47	22%	483	20%	446	1,389	16%	17%	21%
Northeast	6%	71	1%	11	4%	51	4%	97	0%	0	230	3%	3%	2%
East	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%	0%	0%
Southeast	5%	57	21%	374	4%	52	15%	328	16%	351	1,162	14%	13%	15%
South	32%	362	26%	453	23%	273	14%	304	24%	550	1,942	23%	20%	19%
West	9%	102	10%	171	16%	190	6%	139	17%	385	987	12%	13%	12%
Northwest	30%	347	31%	535	47%	549	39%	876	23%	524	2,831	33%	35%	31%
Total	100%	1,149	100%	1,747	100%	1,162	100%	2,227	100%	2,256	8,541	100%	100%	100%
Percentage to DevelopingCommunities		35%		40%		40%		41%		57%		43%	46%	48%

Five year average number of units to the Developing Communities = 1,708

On average over the last five years 43% of the total Single and Semi detached units were built in the developing communities of Calgary. This accounted for 1,708 units per year. (Building Permits New Units Added)

Source: City of Calgary, Planning, Development & Assessment

Figure 35 Historical Growth of Developing Communities by Total Units, by Sector (1999-2003)

	City Total (Single Unit, Semi Detached, Row, Apartment)										1999 - 2003
	1999		2000		2001		2002		2003		Total
	Units		Units		Units		Units		Units		Units
City Total SF/Multi	9,213		10,483		9,965		14,237		11,911		55,809

	Historical Developing Communities Shares (Total Units)										1999-2003	Five Year Average 1999-2003	Three Year Average 2001-2003	Two Year Average 2002-2003
	1999		2000		2001		2002		2003		total	Average	Average	Average
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	units	Share (%)	Share (%)	Share (%)
North	18%	1,188	14%	1,008	12%	946	17%	1,782	19%	1,952	**6,776**	**16%**	**17%**	**18%**
Northeast	12%	792	12%	846	15%	1,118	12%	1,195	10%	913	**4,864**	**12%**	**12%**	**11%**
East	1%	72	0%	0	0%	0	0%	0	0%	0	**72**	**0%**	**0%**	**0%**
Southeast	10%	682	12%	897	8%	645	13%	1,368	16%	1,559	**5,151**	**13%**	**13%**	**16%**
South	20%	1,370	19%	1,427	18%	1,347	14%	1,402	16%	1,514	**7,060**	**17%**	**15%**	**15%**
West	10%	689	14%	1,017	17%	1,308	17%	1,760	19%	1,800	**6,554**	**16%**	**18%**	**18%**
Northwest	29%	1,949	29%	2,145	30%	2,333	27%	2,781	20%	1,925	**11,133**	**27%**	**26%**	**24%**
Total	100%	**6,722**	100%	**7,340**	100%	**7,697**	100%	**10,288**	100%	**9,563**	**41,610**	**100%**	**100%**	**100%**

Five year average number of units to the Developing Communities = 8,322

On average over the last five years 8,322 total units were built in the developing communities. (Building Permits New Units Added)

Source: City of Calgary, Planning, Development & Assessment

Figure 33 Historical Growth of Developing Communities by Single and Semi-Detached Units, by Sector (1999-2003)

	City Total (Single Unit, Semi Detached, Row, Apartment)					1999 - 2003
	1999	2000	2001	2002	2003	Total
	Units	Units	Units	Units	Units	Units
City Total SF/Multi	9,213	10,483	9,965	14,237	11,911	55,809

	City Total (Single Units & Semi Detached)					1999 - 2003
	1999	2000	2001	2002	2003	Total
	Units	Units	Units	Units	Units	Units
City Total	5,954	6,102	7,048	8,761	7,967	35,832
% of Total City Units	65%	58%	71%	62%	67%	

	Historical Developing Communities Shares (Single Unit & Semi Detached)										1999-2003	Five Year Average 1999-2003	Three Year Average 2001-2003	Two Year Average 2002-2003
	1999		2000		2001		2002		2003		total	Share (%)	Share (%)	Share (%)
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	units			
North	18%	978	14%	805	14%	869	16%	1,299	19%	1,406	5,387	16%	16%	18%
Northeast	13%	721	15%	835	16%	1,067	14%	1,098	12%	913	4,634	14%	14%	13%
East	1%	72	0%	0	0%	0	0%	0	0%	0	72	0%	0%	0%
Southeast	11%	625	9%	523	9%	593	13%	1,040	17%	1,208	3,989	12%	13%	15%
South	18%	1,008	17%	974	16%	1,074	14%	1,098	13%	964	5,118	15%	14%	13%
West	10%	567	15%	846	17%	1,118	20%	1,621	19%	1,415	5,567	17%	19%	20%
Northwest	29%	1,602	29%	1,610	27%	1,784	24%	1,909	19%	1,401	8,302	25%	23%	22%
Total	100%	5,573	100%	5,593	100%	6,535	100%	8,061	100%	7,307	33,069	100%	100%	100%
Percentage to Developing Communities		94%		92%		93%		92%		92%		92%	92%	92%

Five year average number of units to the Developing Communities = 6,614

On average over the last five years 92% of the total Single and Semi detached units were built in the developing communities of Calgary. This accounted for 6,614 units per year based upon building permits New Units added.

Figure 34 Historical Growth of Developing Communities by Apartment and Townhouse Units, by Sector (1999-2003)

	City Total (Apartment & Townhouse/Row)				
	1999	2000	2001	2002	2003
	Units	Units	Units	Units	Units
City Total	3,259	4,381	2,917	5,476	3,944
% (Multi) of Total City Units	35%	42%	29%	38%	33%

	Historical Developing Communities Shares (Apartment & Townhouse/Row)										1999-2003	Five Year Average 1999-2003	Three Year Average 2001-2003	Two Year Average 2002-2003
	1999		2000		2001		2002		2003		total	Share (%)	Share (%)	Share (%)
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	units			
North	18%	210	12%	203	4%	47	22%	483	20%	446	1,389	16%	17%	21%
Northeast	6%	71	1%	11	4%	51	4%	97	0%	0	230	3%	3%	2%
East	0%	0	0%	0	0%	0	0%	0	0%	0	0	0%	0%	0%
Southeast	5%	57	21%	374	4%	52	15%	328	16%	351	1,162	14%	13%	15%
South	32%	362	26%	453	23%	273	14%	304	24%	550	1,942	23%	20%	19%
West	9%	102	10%	171	16%	190	6%	139	17%	385	987	12%	13%	12%
Northwest	30%	347	31%	535	47%	549	39%	876	23%	524	2,831	33%	35%	31%
Total	100%	1,149	100%	1,747	100%	1,162	100%	2,227	100%	2,256	8,541	100%	100%	100%
Percentage to DevelopingCommunities		35%		40%		40%		41%		57%		43%	46%	48%

Five year average number of units to the Developing Communities = 1,708

On average over the last five years 43% of the total Single and Semi detached units were built in the developing communities of Calgary. This accounted for 1,708 units per year. (Building Permits New Units Added)

Source: City of Calgary, Planning, Development & Assessment

Figure 35 Historical Growth of Developing Communities by Total Units, by Sector (1999-2003)

	City Total (Single Unit, Semi Detached, Row, Apartment)					1999 - 2003
	1999	2000	2001	2002	2003	Total
	Units	Units	Units	Units	Units	Units
City Total SF/Multi	9,213	10,483	9,965	14,237	11,911	55,809

	Historical Developing Communities Shares (Total Units)										1999-2003	Five Year Average 1999-2003	Three Year Average 2001-2003	Two Year Average 2002-2003
	1999		2000		2001		2002		2003		Total	Average	Average	Average
Sector	%	Units	%	Units	%	Units	%	Units	%	Units	Units	Share (%)	Share (%)	Share (%)
North	18%	1,188	14%	1,008	12%	946	11%	1,150	19%	1,682	6,775	16%	17%	18%
Northeast	12%	792	12%	846	15%	1,118	12%	1,195	10%	913	4,864	12%	12%	11%
East	1%	72	0%	0	0%	0	0%	0	0%	0	72	0%	0%	0%
Southeast	10%	682	12%	897	8%	645	13%	1,368	16%	1,559	5,151	12%	13%	15%
South	20%	1,370	19%	1,427	8%	1,347	14%	1,409	16%	1,514	7,060	17%	15%	15%
West	10%	669	14%	1,017	17%	1,308	17%	1,767	19%	1,800	6,554	16%	18%	18%
Northwest	29%	1,949	29%	2,145	30%	2,333	27%	2,781	25%	1,325	11,133	27%	26%	24%
Total	100%	6,722	100%	7,340	100%	7,697	100%	10,288	100%	9,563	41,610	100%	100%	100%

Five year average number of units to the Developing Communities = 8,322

On average over the last five years 8,322 total units were built in the developing communities. Building Permits New Units Added

Source: City of Calgary Planning, Development & Assessment

NORTH SECTOR
NORTHWEST SECTOR
NORTHEAST SECTOR
CENTRE SECTOR
WEST SECTOR
EAST SECTOR
SOUTH SECTOR
SOUTHEAST SECTOR
Growth between September 1998 and September 2003 approximately 6,300 acres (2,550 hectares), or 1,260 acres (510 hectares) per year on average

DISTRIBUTION OF SUBURBAN RESIDENTIAL LANDS BUILT OUT BETWEEN 1998 AND 2003 (Five Years)

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

CITY-WIDE
MAP 7

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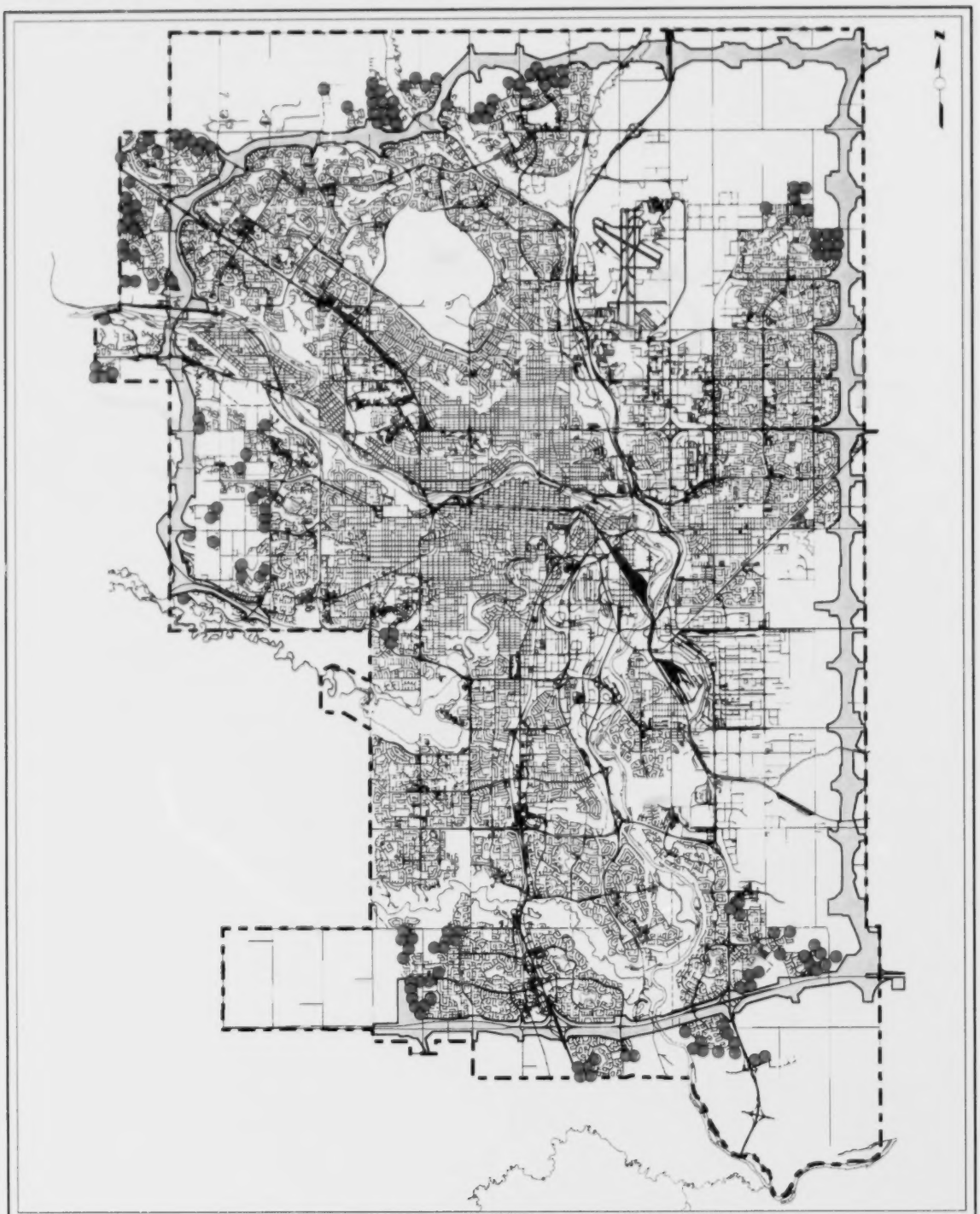
DEMAND

Figure 36 Location of Developer Proposals 2004, Areas in Which Developers have Indicated Residential Development Activity

Sector	Hectares	Acres	%	Community Districts Affected
North	225	556	24%	Coventry Hills, Evanston, Panorama Hills, Symons Valley(Kincora, Sherwood)
Northeast	109	268	11%	Martindale, Saddle Ridge, Taradale
East	0	0	0%	None in 2004
Southeast	184	455	19%	Community A (Auburn Bay), Copperfield, Cranston, McKenzie Towne, New Brighton
South	161	399	17%	Bridlewood, Chaparral, Evergreen
West	120	297	13%	Aspen Woods, Crestmont, Cougar Ridge, Discovery Ridge, Springbank Hill, West Springs
Northwest	151	372	16%	Arbour Lake, Edgemont, Rocky Ridge, Royal Oak, Tuscany, Valley Ridge
Total	950	2,348	100%	

See Associated Map 3

Source: City of Calgary, Planning, Development & Assessment, Developer survey - 2004 Development Proposals



2004 DEVELOPER SURVEY

AREAS IN WHICH DEVELOPERS HAVE INDICATED
ANTICIPATED DEVELOPMENT ACTIVITY

THE CITY OF CALGARY	Suburban Residential Growth Information Update 2004-2008	CITY-WIDE MAP 8 \\work\work\plan\growth\report\developer_survey.mxd

Figure 37 Short-Term Estimates of Single and Semi-Detached Housing Demand, City-Wide, Developing Communities and by Sector (April 2004-April 2008)

Total Units Forecast (Single/Semi Detached/Townhouse & Apartment) - City Wide

	2004 Units	2005 Units	2006 Units	2007 Units	2008 Units	2004 - 2008 Total Units
City Total	9,100	9,100	9,000	8,900	8,900	45,000

	1999-2003 Historical Share: Average 5 year	Average 3 year	Average 2 year	Total: Single & Semi Detached Forecast - City Wide: 2004 Units	2005 Units	2006 Units	2007 Units	2008 Units	2004 - 2008 Total Units	Total Acres
City Total	64%	66%	64%	6,800	6,300	6,300	6,200	6,200	31,800	5,300
Share of total units=				75%	69%	70%	70%	70%		

	1999-2003 Historical Share: Average % 5 year	Average % 3 year	Average % 2 year	Single & Semi Detached / to the Developing Communities Forecast: 2004 %	2004 Units	2005 %	2005 Units	2006 %	2006 Units	2007 %	2007 Units	2008 %	2008 Units	2004 - 2008 Average Share (%)	Total Units	Total Acres
North	16%	16%	18%	19%	1,230	21%	1,260	22%	1,320	23%	1,350	24%	1,410	22%	6,570	1,100
Northeast	14%	14%	13%	12%	780	12%	720	12%	720	12%	710	12%	710	12%	3,640	610
East	0%	0%	0%	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0
Southeast	12%	13%	15%	18%	1,160	18%	1,140	20%	1,280	21%	1,240	23%	1,350	20%	6,090	1,020
South	15%	14%	13%	14%	900	15%	900	16%	960	17%	1,000	17%	1,000	16%	4,760	790
West	17%	19%	20%	19%	1,230	17%	1,020	16%	960	15%	880	15%	880	16%	4,970	830
Northwest	25%	23%	22%	18%	1,160	16%	960	14%	840	12%	710	9%	530	14%	4,200	700
Developing Total	100%	100%	100%	100%	6,460 @95%	100%	5,985 @95%	100%	5,985 @95%	100%	5,890 @95%	100%	5,890 @95%	100%	30,230	5,050

Notes:
Total City Forecast for all unit types Single and Multi Unit
Forecasts assume 600 duplex units per year in addition to single family units.
Historical share of growth in Single & Semi Detached that occurs in the developing communities ranges between 90 - 95 % in any given year. **95%** is used to forecast the next 5 years shares
Totals may not add due to rounding
Total Single & Semi Detached acres based on 6.0 units per acres which do not include Multi Family units estimates and are used here for general land need purposes
The caveat identified in figure 37 apply to this table as well

Source: City of Calgary, Planning, Development & Assessment, Socio-Economic Outlook 2003-2008 Calgary & Region

Figure 38 Short-Term Estimates of City Total Units Demand, City-Wide, Developing Communities and by Sector (April 2004-April 2008)

City Total Forecast (Total Units)

	2004 Units	2005 Units	2006 Units	2007 Units	2008 Units	2004 - 2008 Total Units
City Total	9,100	9,100	9,000	8,900	8,900	45,000

	1999-2003 Historical Share: Average % 5 year	Average % 3 year	Average % 2 year	Developing Communities Forecast (Total Units): 2004 %	2004 Units	2005 %	2005 Units	2006 %	2006 Units	2007 %	2007 Units	2008 %	2008 Units	2004 - 2008 Average Share (%)	Total Units	Total Acres
North	16%	17%	18%	18%	1,430	20%	1,500	21%	1,570	22%	1,600	22%	1,660	21%	7,760	1,100
Northeast	12%	12%	11%	11%	860	11%	820	11%	830	11%	820	11%	820	11%	4,150	580
East	0%	0%	0%	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0
Southeast	12%	13%	15%	18%	1,420	19%	1,480	20%	1,540	21%	1,580	23%	1,690	20%	7,710	1,080
South	17%	15%	15%	16%	1,280	18%	1,350	18%	1,340	19%	1,380	19%	1,380	18%	6,730	800
West	16%	16%	18%	17%	1,330	15%	1,150	15%	1,100	14%	1,020	14%	1,020	15%	5,620	1,000
Northwest	27%	26%	24%	19%	1,450	17%	1,310	15%	1,160	14%	1,030	11%	850	15%	5,800	1,000
Developing Total	100%	100%	100%	100%	7,770	100%	7,610	100%	7,540	100%	7,430	100%	7,420	100%	37,770	5,500

Notes. Total unit acres is based on a variety of densities from actual approved planned land supply using Tentative Plan and Outline Plan build out capacities.
These capacities are from actual build out of these areas for each sector and reflect the five year 2004-2008 blue growth bands.

SOURCE: Planning Development & Assessment, 2003 / Socio-Economic Outlook 2003-2008 Calgary and Region Report , 2003

Caveat:
The forecasts shown here represent growth expected from April 2003 to April 2008 to coincide with the annual civic census timelines.

The likely distribution of new suburban growth over the next five years is shown on Map 8 of Appendix I. As with any forecast growth locations should be considered as possible growth directions. Actual locations may and do vary. The colours denote general development patterns of which the specific timing of development is not certain. To keep information as relevant as possible this analysis will be reviewed and updated annually. Finally these forecasts are not intended to control absorption rates or limit choice and competition in the market place.

The City of Calgary is presently in the process of negotiating annexation of new lands in various areas outside of the city's current jurisdictional boundary. If additional lands are annexed over the next year a portion of this growth may shift to other areas presently outside the city's boundary, resulting in changes to servicing, transportation and planning approval considerations. Modifications to the growth allocations and the forecast map may be affected, and will be included in future updates of this report.

Figure 37 Short-Term Estimates of Single and Semi-Detached Housing Demand, City-Wide, Developing Communities and by Sector (April 2004-April 2008)

Total Units Forecast (Single/Semi Detached/Townhouse & Apartment) - City Wide						
	2004	2005	2006	2007	2008	2004 - 2008
City Total	9,100	9,100	9,000	8,900	8,900	45,000

	Historical Share			Total Single & Semi Detached Forecast - City Wide						
	Average 5 year	Average 3 year	Average 2 year	2004	2005	2006	2007	2008	2004 - 2008	
City Total	100%	100%	100%	6,800	6,300	6,300	6,200	6,200	31,800	5,300

	Historical Share			Single & Semi Detached - to the Developing Communities Forecast										
	Average 5 year	Average 3 year	Average 2 year	2004		2005		2006		2007		2008		2004 - 2008
North	19%	18%	18%	19%	1,270	21%	1,320	22%	1,380	23%	1,430	24%	1,470	22% 6,570 1,100
Northeast	14%	14%	13%	12%	780	12%	720	12%	720	12%	710	12%	710	12% 3,640 610
East	0%	0%	0%	0%	0	0%	0	0%	0	0%	0	0%	0	0% 0 0
Southeast	12%	13%	15%	19%	1,160	19%	1,140	20%	1,200	21%	1,240	23%	1,350	20% 6,090 1,020
South	15%	14%	13%	13%	900	13%	800	13%	780	13%	770	13%	750	16% 4,760 790
West	17%	19%	20%	19%	1,290	17%	1,020	16%	960	15%	880	15%	880	16% 4,970 930
Northwest	23%	23%	22%	18%	1,180	16%	1,000	14%	840	12%	720	11%	660	14% 4,200 700
Developing Total	100%	100%	100%	100%	6,460	100%	5,985	100%	5,985	100%	5,830	100%	5,830	100% 30,230 5,050

Source: City of Calgary, Planning, Development & Assessment, Socio-Economic Outlook 2003-2008 Calgary & Region

Figure 38 Short-Term Estimates of City Total Units Demand, City-Wide, Developing Communities and by Sector (April 2004-April 2008)

City Total Forecast (Total Units)						
	2004	2005	2006	2007	2008	2004 - 2008
City Total	9,100	9,100	9,000	8,900	8,900	45,000

	Historical Share			Developing Communities Forecast (Total Units)										
	Average 5 year	Average 3 year	Average 2 year	2004		2005		2006		2007		2008		2004 - 2008
North	19%	17%	18%	18%	1,430	20%	1,520	21%	1,570	22%	1,620	23%	1,660	21% 7,760 1,100
Northeast	12%	12%	11%	11%	860	11%	820	11%	830	11%	820	11%	820	11% 4,150 600
East	0%	0%	0%	0%	0	0%	0	0%	0	0%	0	0%	0	0% 0 0
Southeast	12%	13%	15%	18%	1,420	19%	1,480	20%	1,540	21%	1,580	23%	1,690	20% 7,710 1,000
South	14%	14%	15%	16%	1,290	16%	1,180	16%	1,140	16%	1,180	16%	1,190	16% 6,730 800
West	16%	16%	18%	17%	1,330	15%	1,150	15%	1,100	14%	1,020	14%	1,020	15% 5,620 1,000
Northwest	27%	28%	24%	19%	1,450	17%	1,310	15%	1,160	14%	1,030	11%	850	15% 5,800 1,000
Developing Total	100%	100%	100%	100%	7,770	100%	7,610	100%	7,540	100%	7,430	100%	7,420	100% 37,770 5,500

Notes: Total unit acres is based on a variety of densities from actual approved planned land supply using Tentative Plan and Outline Plan build out capacities.
These capacities are from actual build out of these areas for each sector and reflect the five year 2004-2008 blue growth bands.

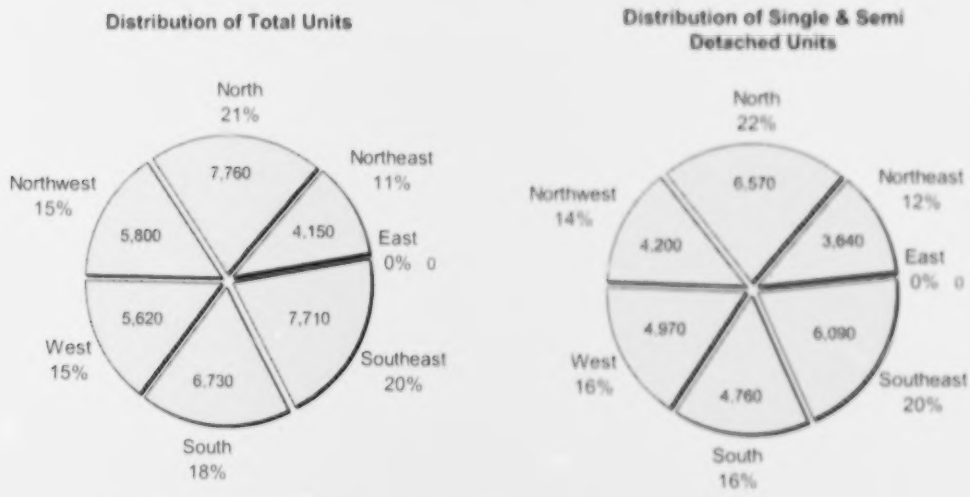
Source: Planning, Development & Assessment, City - Socio-Economic Outlook 2003-2008 Calgary & Region, 2004

Caveat:
The forecasts shown here represent growth expected from April 2003 to April 2008 in concert with the annual civic census timelines.

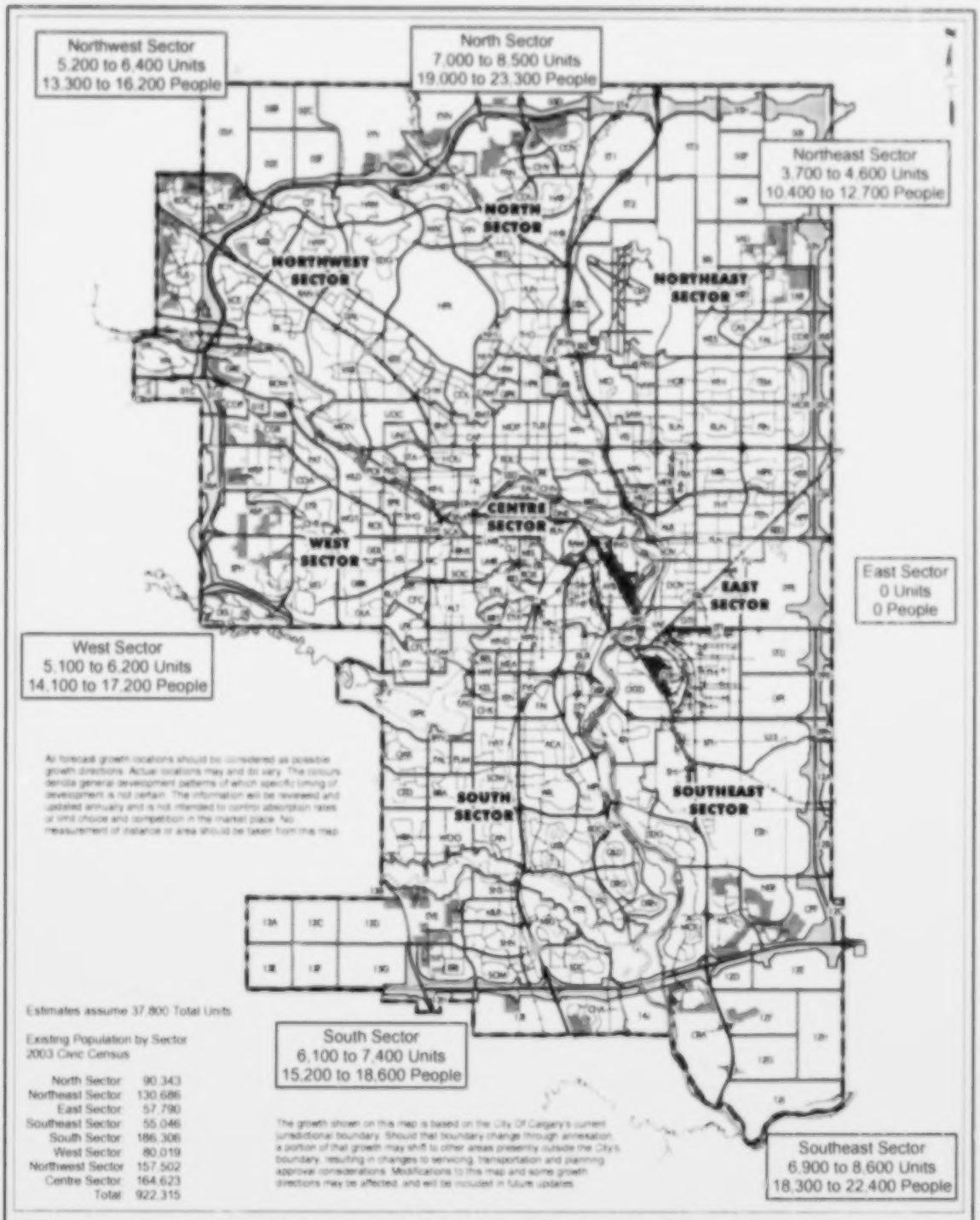
The likely distribution of new suburban growth over the next five years is shown on Map 8 of Appendix I. As with any forecast, growth allocations should be considered as possible growth directions. Actual locations may and do vary. The colours denote general development patterns of which the specific timing of development is not certain. To keep information as relevant as possible this analysis will be reviewed and updated annually. Primarily these forecasts are not intended to control absorption rates or land choices and competition in the market place.

The City of Calgary is presently in the process of negotiating annexation of new lands in various areas outside of the city's current jurisdictional boundary. If additional lands are annexed over the next year a portion of this growth may shift to other areas presently outside the city's boundary, resulting in changes to servicing, transportation and planning approval considerations. Modifications to the growth allocations and the forecast map may be affected, and will be included in future updates of this report.

Figure 39 Expected Distribution of new Units by Sector, Developing Communities (2004-2008)



Source: City of Calgary, Planning, Development & Assessment


Northwest Sector
5,200 to 6,400 Units
13,300 to 16,200 People
North Sector
7,000 to 8,500 Units
19,000 to 23,300 People
Northeast Sector
3,700 to 4,600 Units
10,400 to 12,700 People
NORTH SECTOR
NORTHWEST SECTOR
NORTHEAST SECTOR
CENTRE SECTOR
WEST SECTOR
EAST SECTOR
East Sector
0 Units
0 People
West Sector
5,100 to 6,200 Units
14,100 to 17,200 People
All forecast growth locations should be considered as possible growth directions. Actual locations may and do vary. The colours denote general development patterns of which specific timing of development is not certain. The information will be reviewed and updated annually and is not intended to control absorption rates or limit choice and competition in the market place. No measurement of distance or area should be taken from this map.
SOUTH SECTOR
SOUTHEAST SECTOR
Estimates assume 37,800 Total Units
Existing Population by Sector
2003 Civic Census
North Sector 90,343
Northeast Sector 130,686
East Sector 57,790
Southeast Sector 55,046
South Sector 186,308
West Sector 80,019
Northwest Sector 157,502
Centre Sector 164,623
Total 922,315
South Sector
6,100 to 7,400 Units
15,200 to 18,600 People
The growth shown on this map is based on the City Of Calgary's current jurisdictional boundary. Should that boundary change through annexation, a portion of that growth may shift to other areas presently outside the City's boundary, resulting in changes to servicing, transportation and planning approval considerations. Modifications to this map and some growth directions may be affected, and will be included in future updates.
Southeast Sector
6,900 to 8,600 Units
18,300 to 22,400 People

SUBURBAN RESIDENTIAL GROWTH FORECAST 2004-2008

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

CITY-WIDE
MAP 9

Figure 40 Short-Term Estimates of Residential Land Supply and Demand Conditions for Residential Uses by Developing Communities (2004-2008)

Requirements to April 2004 and ends at April 2008 to coincide with the annual civic census and land inventory

Sector	2004	2005	2006	2007	2008	Total Demand 2004-2008	Fully Serviced Supply With Utility Capacity (*) (Green areas)	Surplus or Shortfall By 2008(*)
North	204	214	224	229	237	1,100	1,845	745
Northeast	123	117	119	117	117	600	800	200
East	0	0	0	0	0	0	0	NA
Southeast	189	197	205	211	225	1,000	1,843	843
South	160	169	168	173	173	800	1,010	210
West	233	202	193	179	179	1,000	532	-469
Northwest	250	226	200	178	147	1,000	807	-193
Total	1,160 Acres	1,130 Acres	1,110 Acres	1,090 Acres	1,080 Acres	5,500 Acres	6,835 Acres	1,335 Acres

Notes: * Unsubdivided land only Does not include Vacant Serviced capacity

Excludes the following supply available in existing vacant subdivided lots (refer to Figure 7).

10,765	Single and Semi-detached Units	1,538	Acres
2,579	Multi Unit (Apartment & Townhouse)	420	Acres
13,344	Total vacant subdivided units unbuilt	1,958	Total available acres

Lands/units available as existing vacant subdivided as of April 2003 Inventory

Source: City of Calgary Planning, Development & Assessment

APPENDIX II: SECTOR PROFILES

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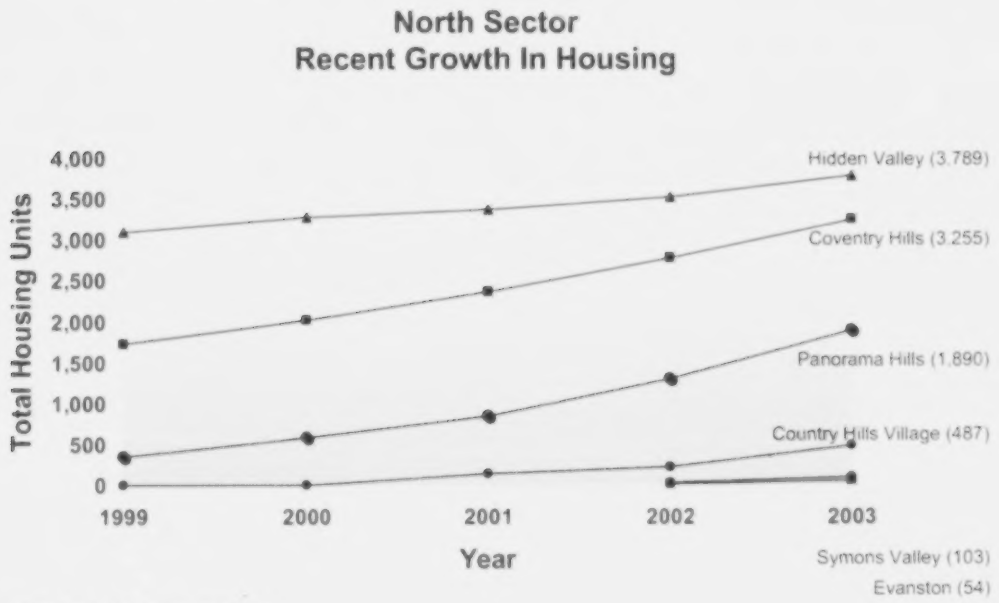
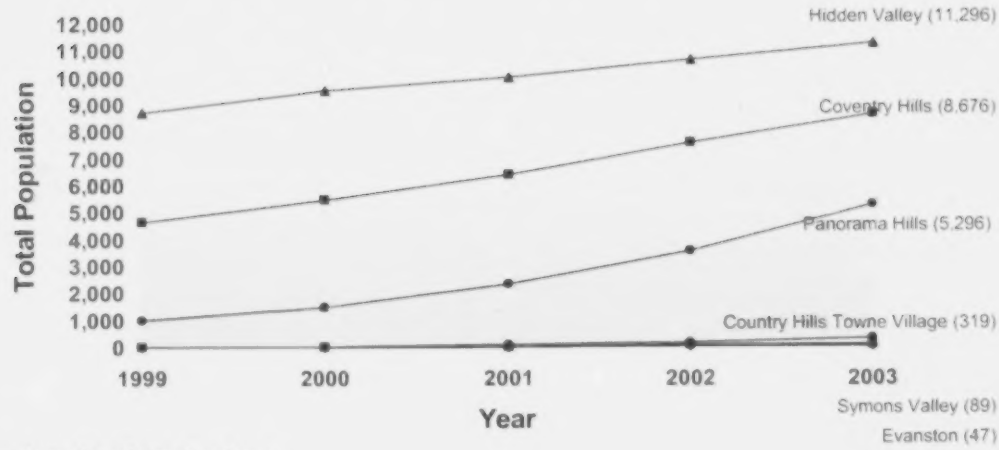
Figure 1 **North Sector, Recent Growth in Housing**



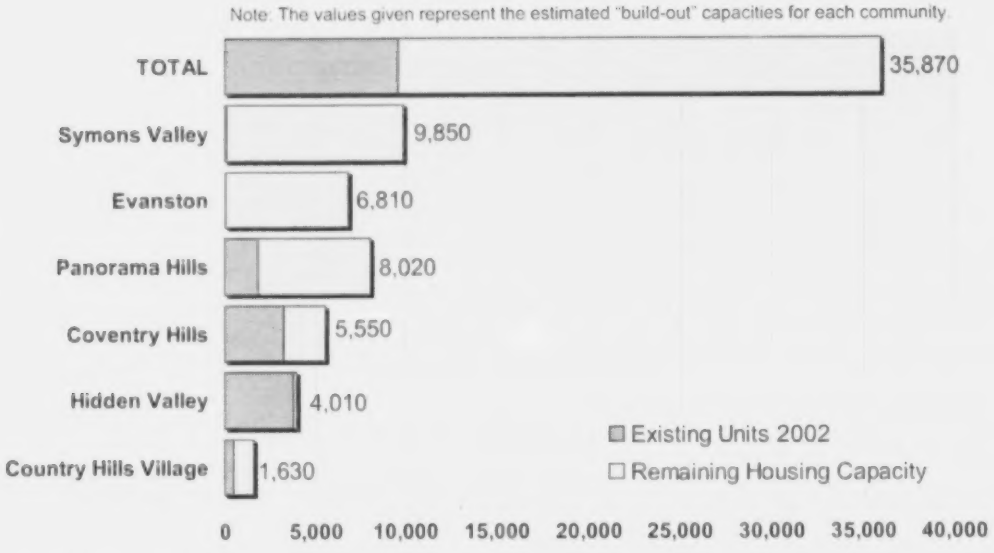
Source: City of Calgary, Civic Census

Figure 2 **North Sector, Recent Growth in Population**



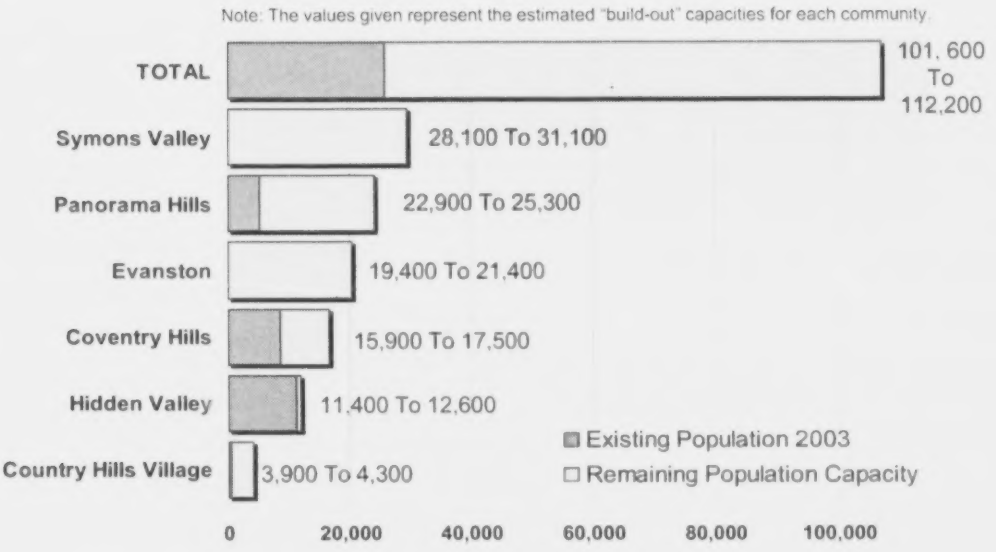
Source: City of Calgary, Civic Census

Figure 3 North Sector, Housing Capacity of Developing Communities



Source: City of Calgary, Planning Development & Assessment

Figure 4 North Sector, Population Capacity of Developing Communities



Source: City of Calgary, Planning Development & Assessment

Unsubdivided Residential Land Supply (as of April 2003)

- Fully Serviced (Both Water and Sewer in Place)
- Partially Serviced (Water or Sewer, But Not Both)
- Needs Sanitary
- Needs Storm
- Needs Water
- Unserviced (No Water or Sewer in Place)
- Subject To Review (Will Include Residential And Non Residential Uses)

- Future Sanitary Lift Station
- Future Pressure Reduction Station
- Future Pump Station
- Future Reservoir
- Future Sanitary Sewer Trunk
- Future Storm Sewer Trunk
- Future Water Feedermain

- Sector Boundary
- Future Expressway
- Future Major Road
- Transportation Utility Corridor

0 1,000 2,000 3,000
Meters

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

NORTH SECTOR
MAP 1
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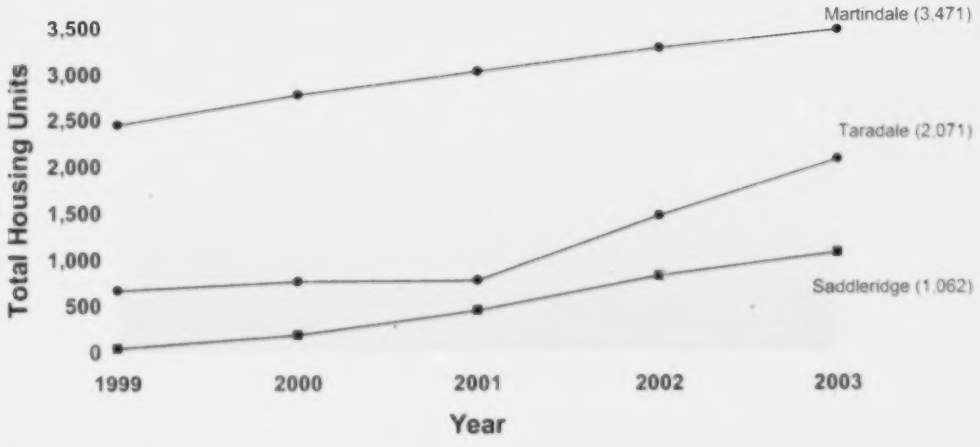
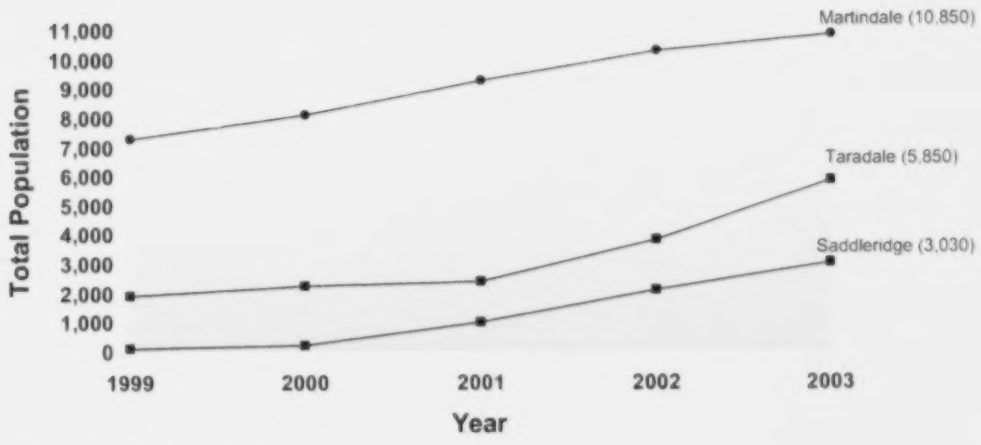
Figure 5 Northeast Sector, Recent Growth in Housing



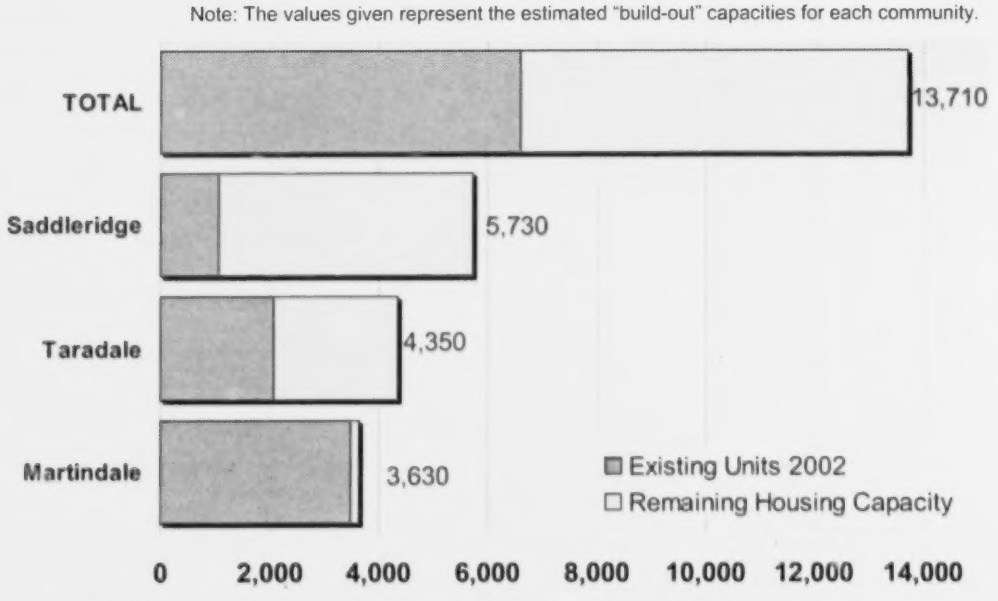
Source: City of Calgary, Civic Census

Figure 6 Northeast Sector, Recent Growth in Population



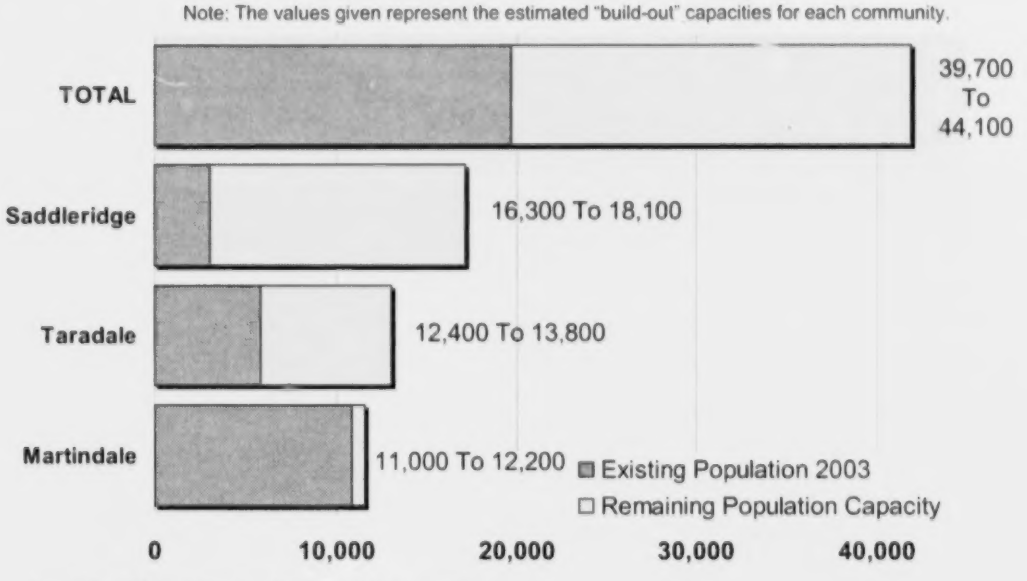
Source: City of Calgary, Civic Census

Figure 7 Northeast Sector, Housing Capacity of Developing Communities



Source: City of Calgary, Planning, Development & Assessment

Figure 8 Northeast Sector, Population Capacity of Developing Communities



Source: City of Calgary, Planning, Development & Assessment

Unsubdivided Residential Land Supply (as of April 2003)

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- Future Major Road
- Transportation Utility Corridor

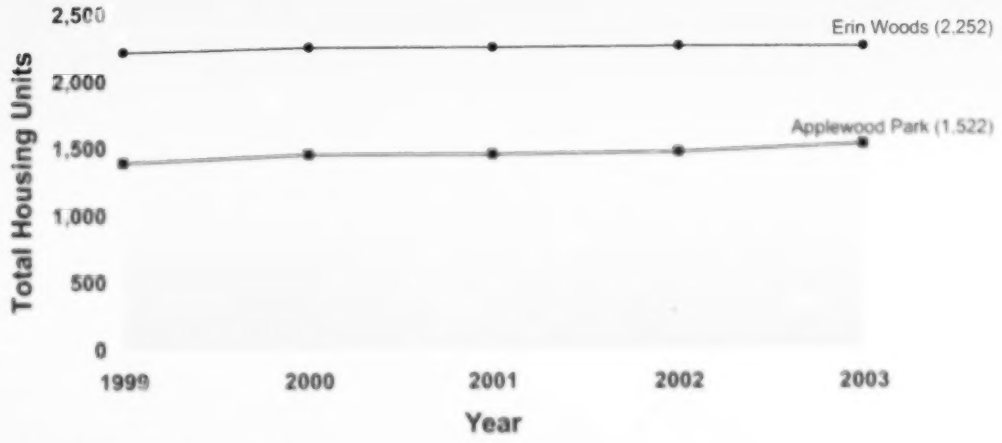
0 1,000 2,000
Meters

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

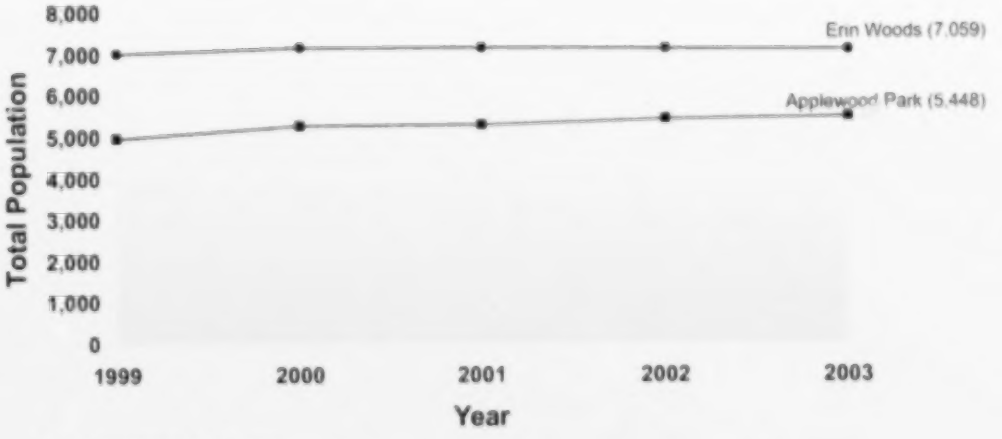
NORTHEAST SECTOR
MAP 2

Figure 9 East Sector, Recent Growth in Housing



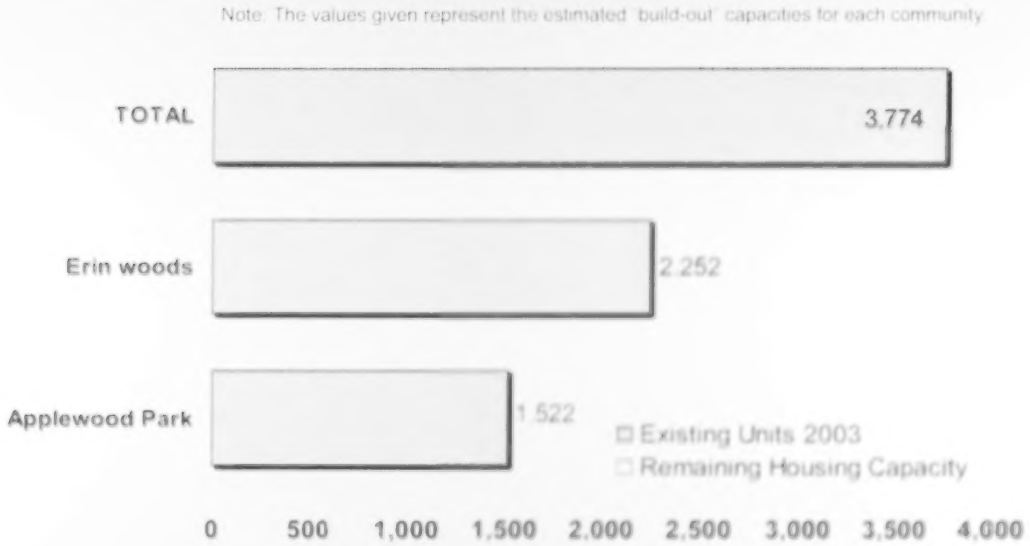
Source: City of Calgary, Civic Census

Figure 10 East Sector, Recent Growth in Population



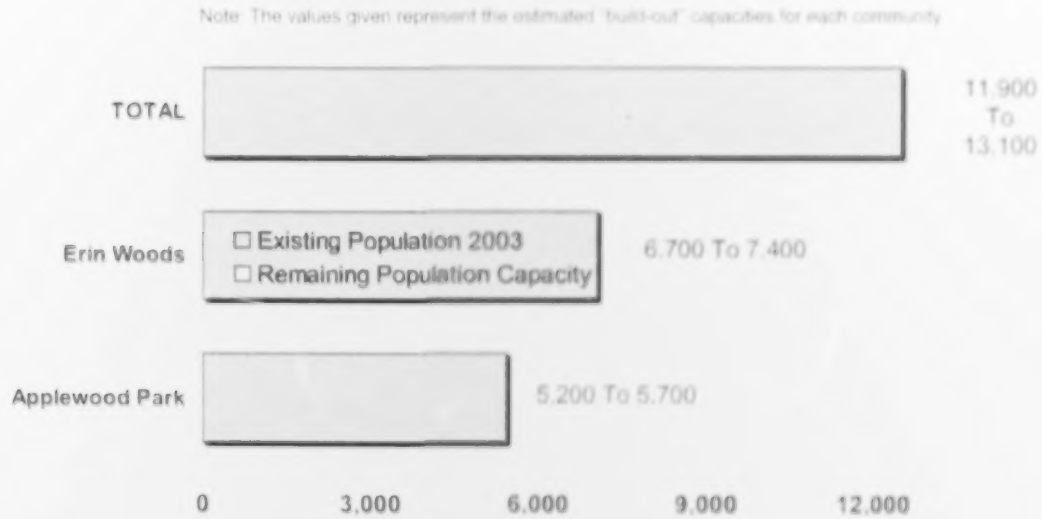
Source: City of Calgary, Civic Census

Figure 11 East Sector, Housing Capacity of Developing Communities



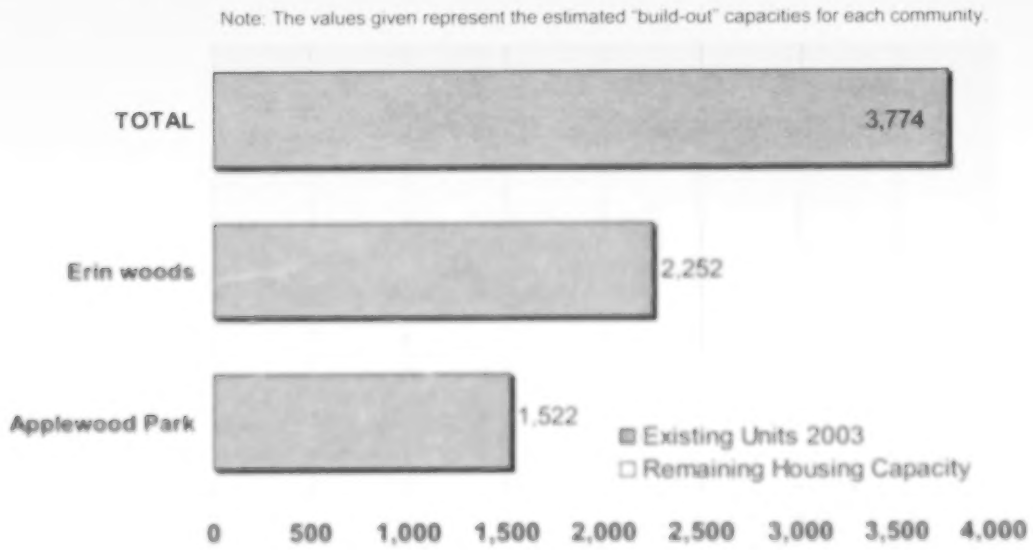
Source: City of Calgary, Planning, Development & Assessment

Figure 12 East Sector, Population Capacity of Developing Communities



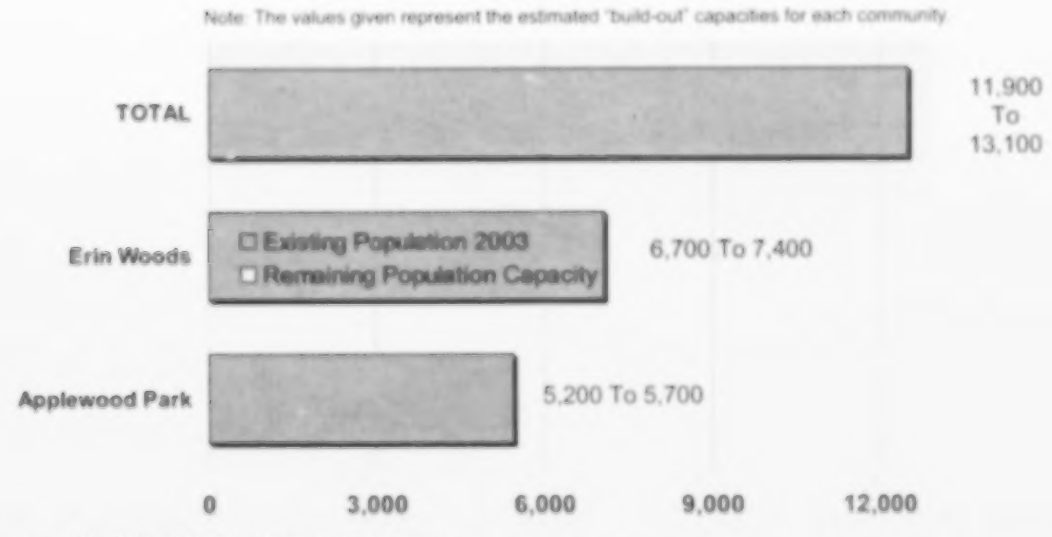
Source: City of Calgary, Planning, Development & Assessment

Figure 11 East Sector, Housing Capacity of Developing Communities



Source: City of Calgary, Planning, Development & Assessment

Figure 12 East Sector, Population Capacity of Developing Communities



Source: City of Calgary, Planning, Development & Assessment

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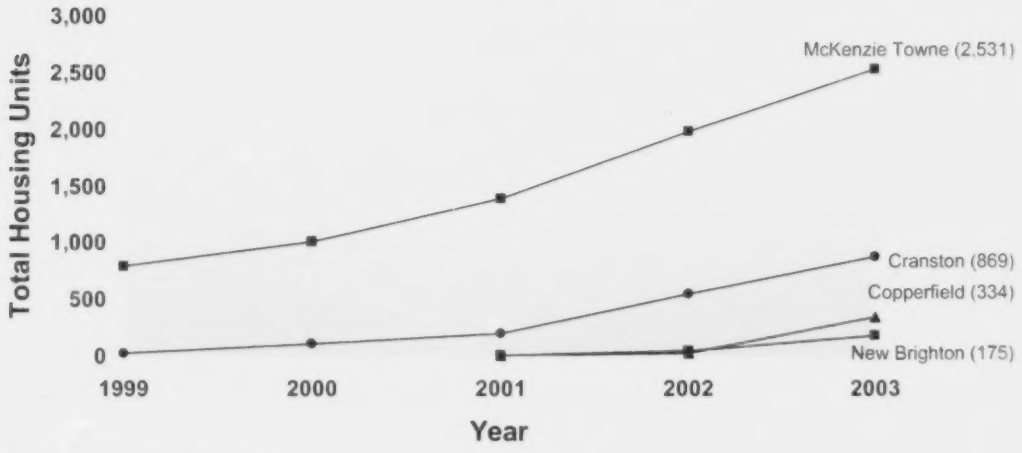
0 1,000 2,000
Meters

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

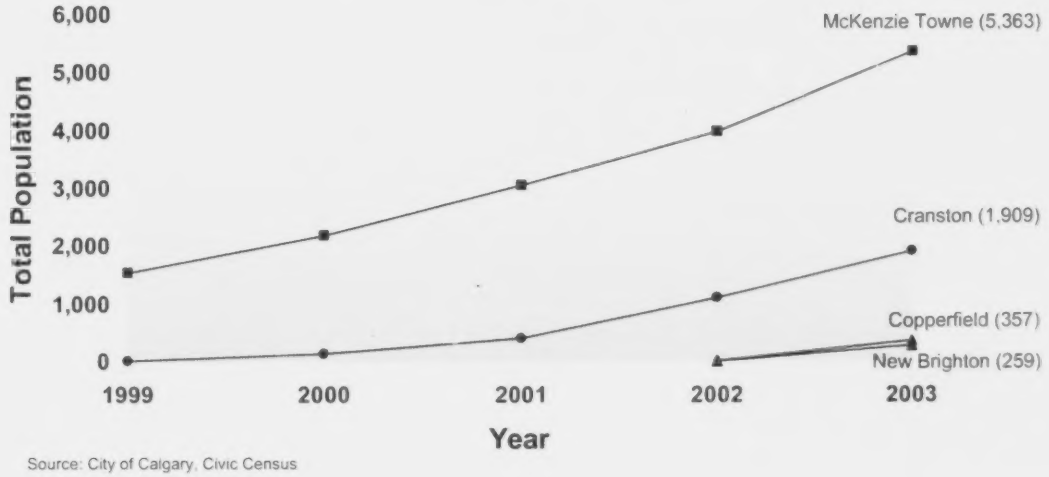
EAST SECTOR
MAP 3

Figure 13 Southeast Sector, Recent Growth in Housing



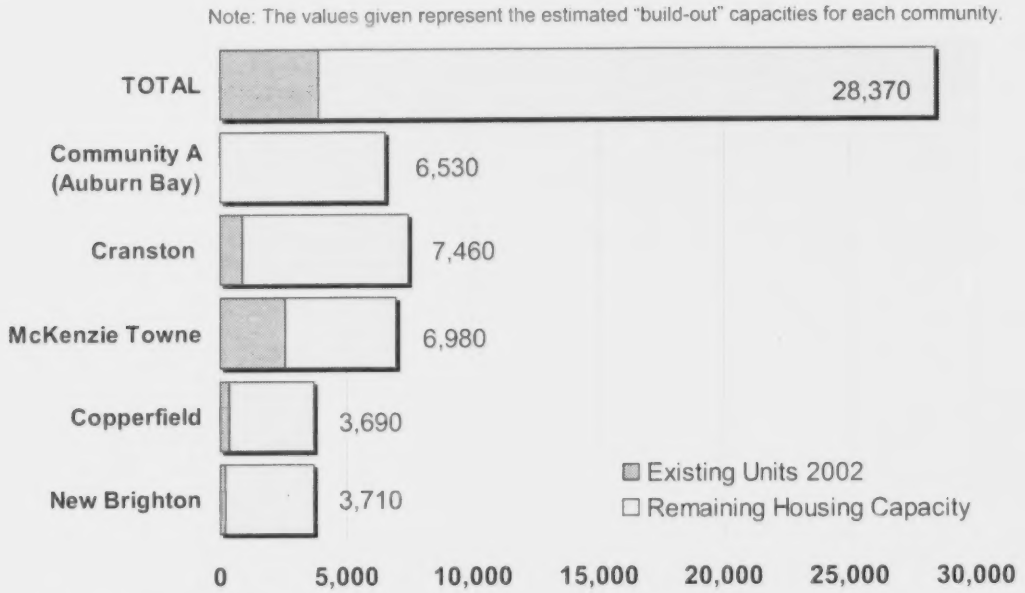
Source: City of Calgary, Civic Census

Figure 14 Southeast Sector, Recent Growth in Population



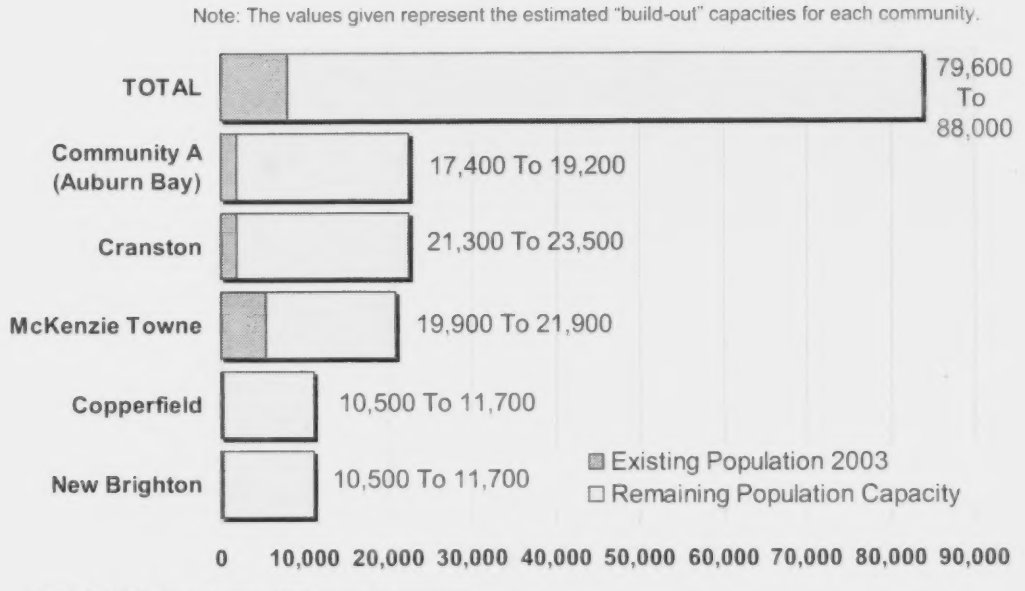
Source: City of Calgary, Civic Census

Figure 15 Southeast Sector, Housing Capacity of Developing Communities



Source: City of Calgary, Planning, Development & Assessment

Figure 16 Southeast Sector, Population Capacity of Developing Communities



Source: City of Calgary, Planning, Development & Assessment

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0 1,000 2,000 3,000
Meters

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

SOUTHEAST SECTOR
MAP 4
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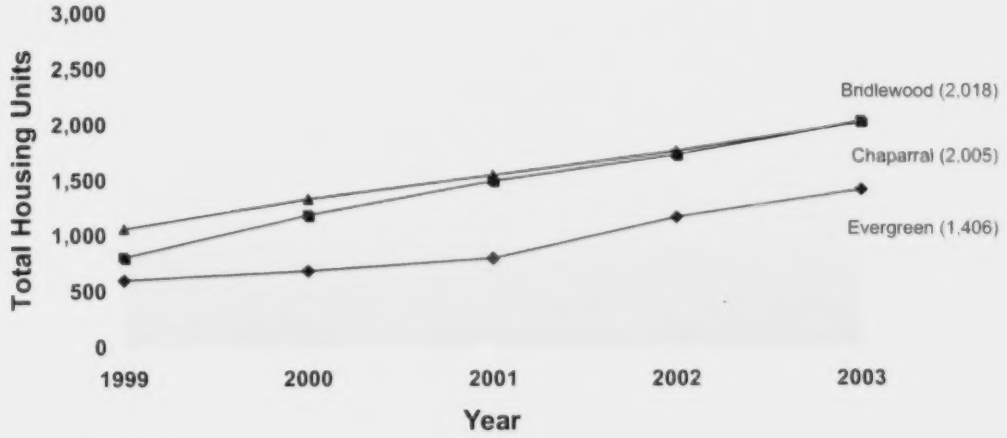
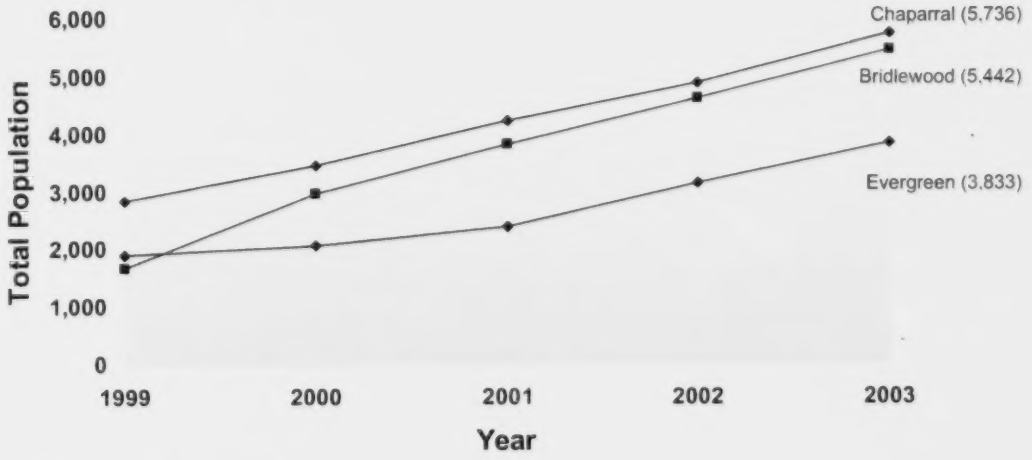
Figure 17 South Sector, Recent Growth in Housing



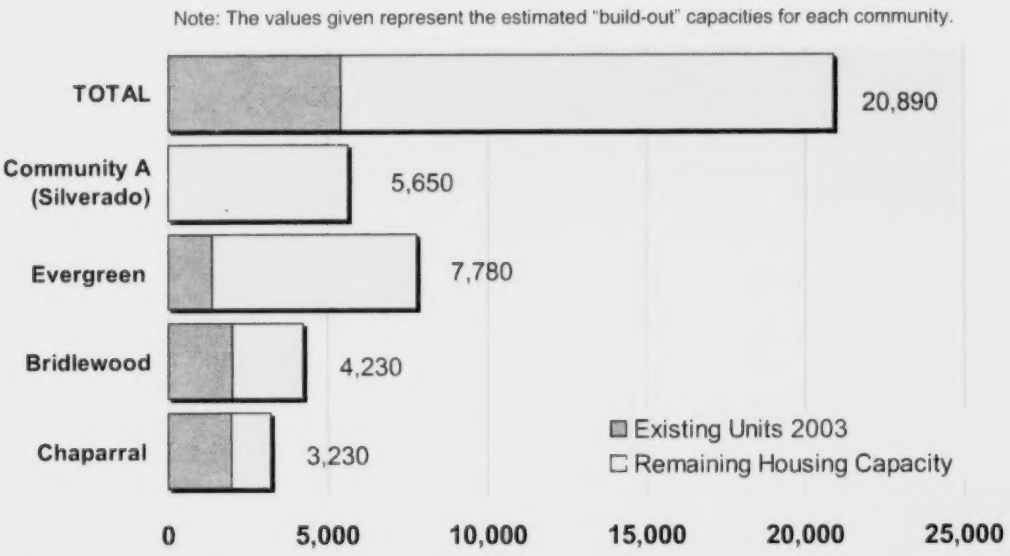
Source: City of Calgary, Civic Census

Figure 18 South Sector, Recent Growth in Population



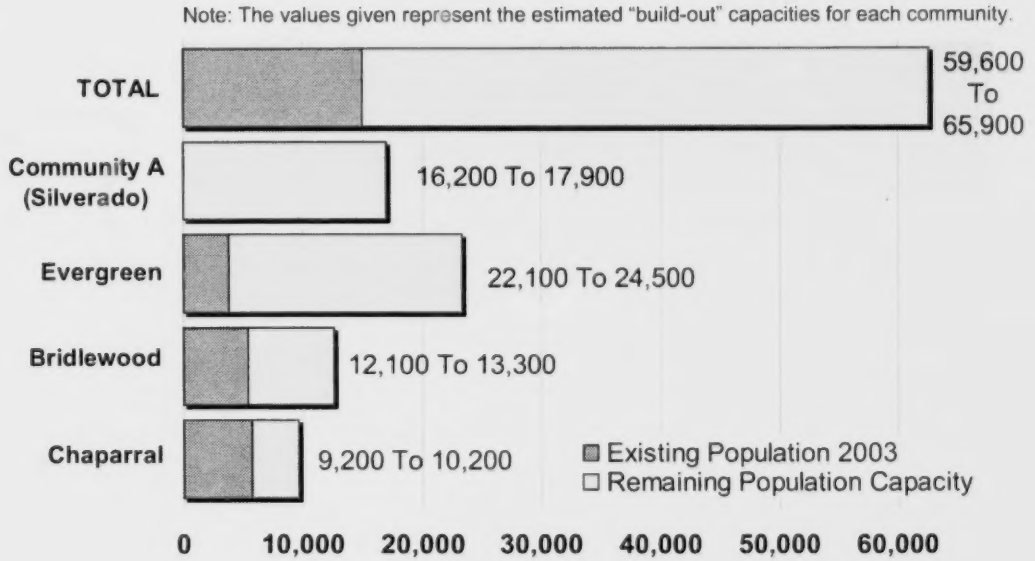
Source: City of Calgary, Civic Census

Figure 19 South Sector, Housing Capacity of Developing Communities



Source: City of Calgary, Planning, Development & Assessment

Figure 20 South Sector, Population Capacity of Developing Communities



Source: City of Calgary, Planning, Development & Assessment

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- Future Major Road
- Transportation Utility Corridor

0 1,000 2,000 3,000 4,000
Meters

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

SOUTH SECTOR
MAP 5

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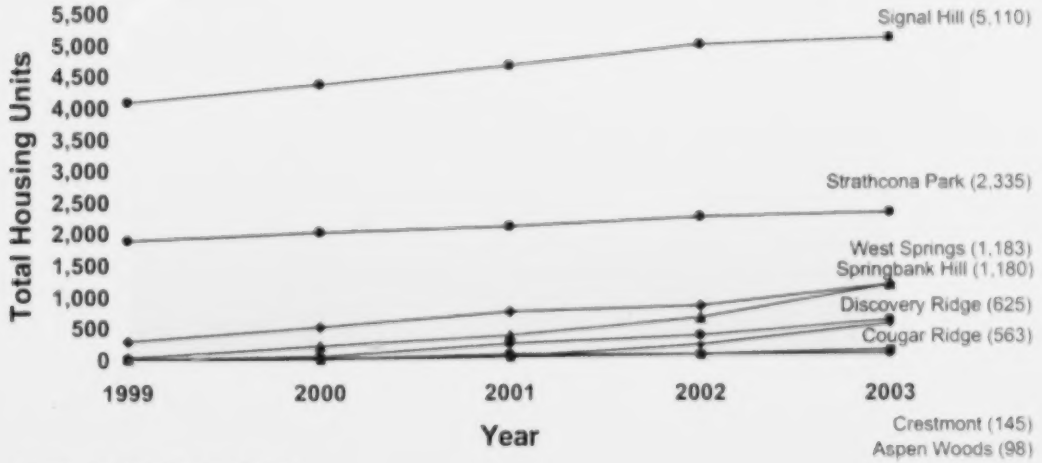
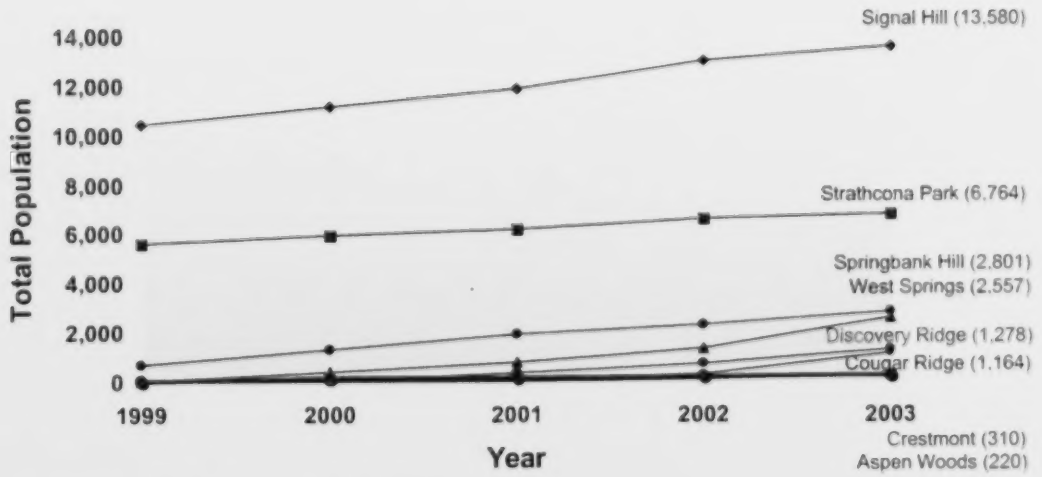
Figure 21 West Sector, Recent Growth in Housing



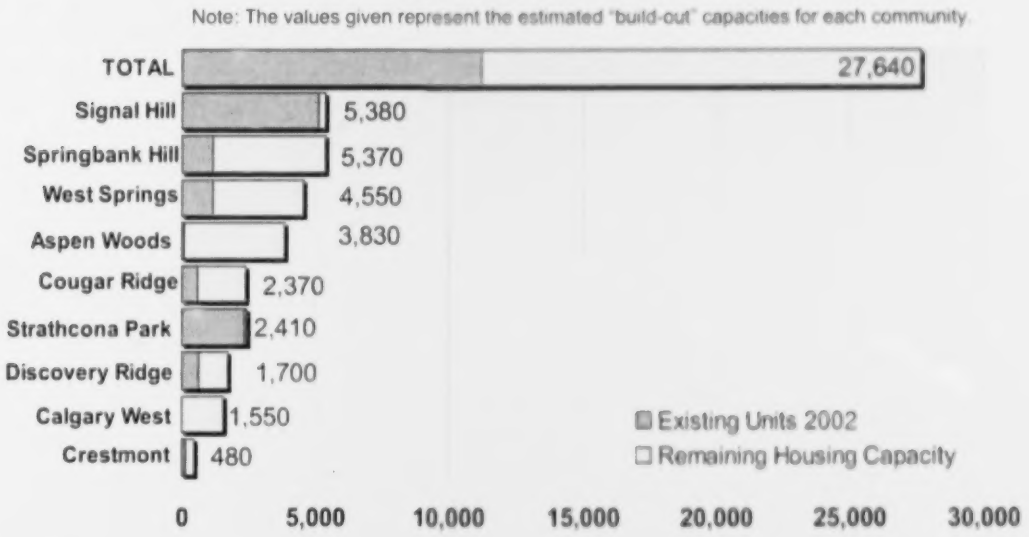
Source: City of Calgary, Civic Census

Figure 22 West Sector, Recent Growth in Population



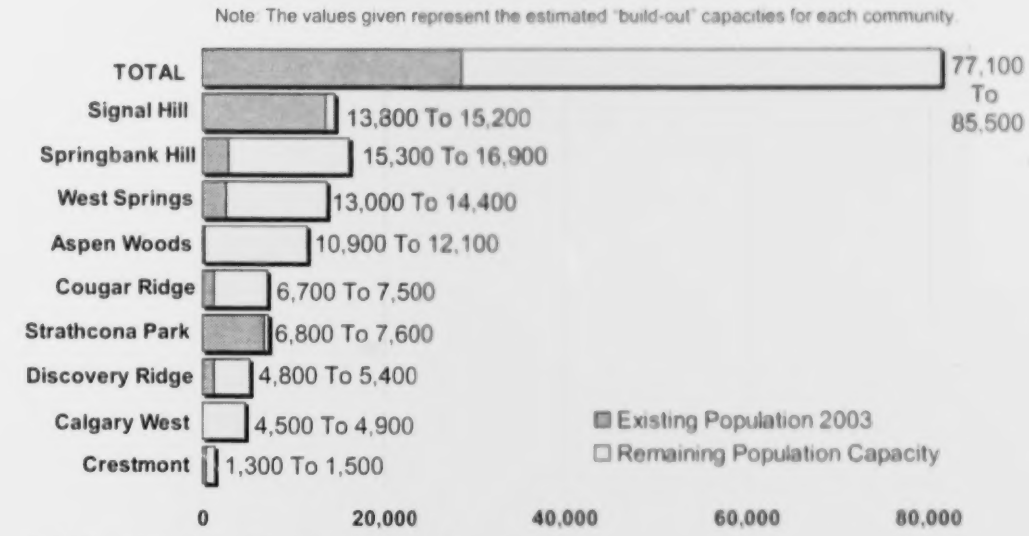
Source: City of Calgary, Civic Census

Figure 23 West Sector, Housing Capacity of Developing Communities

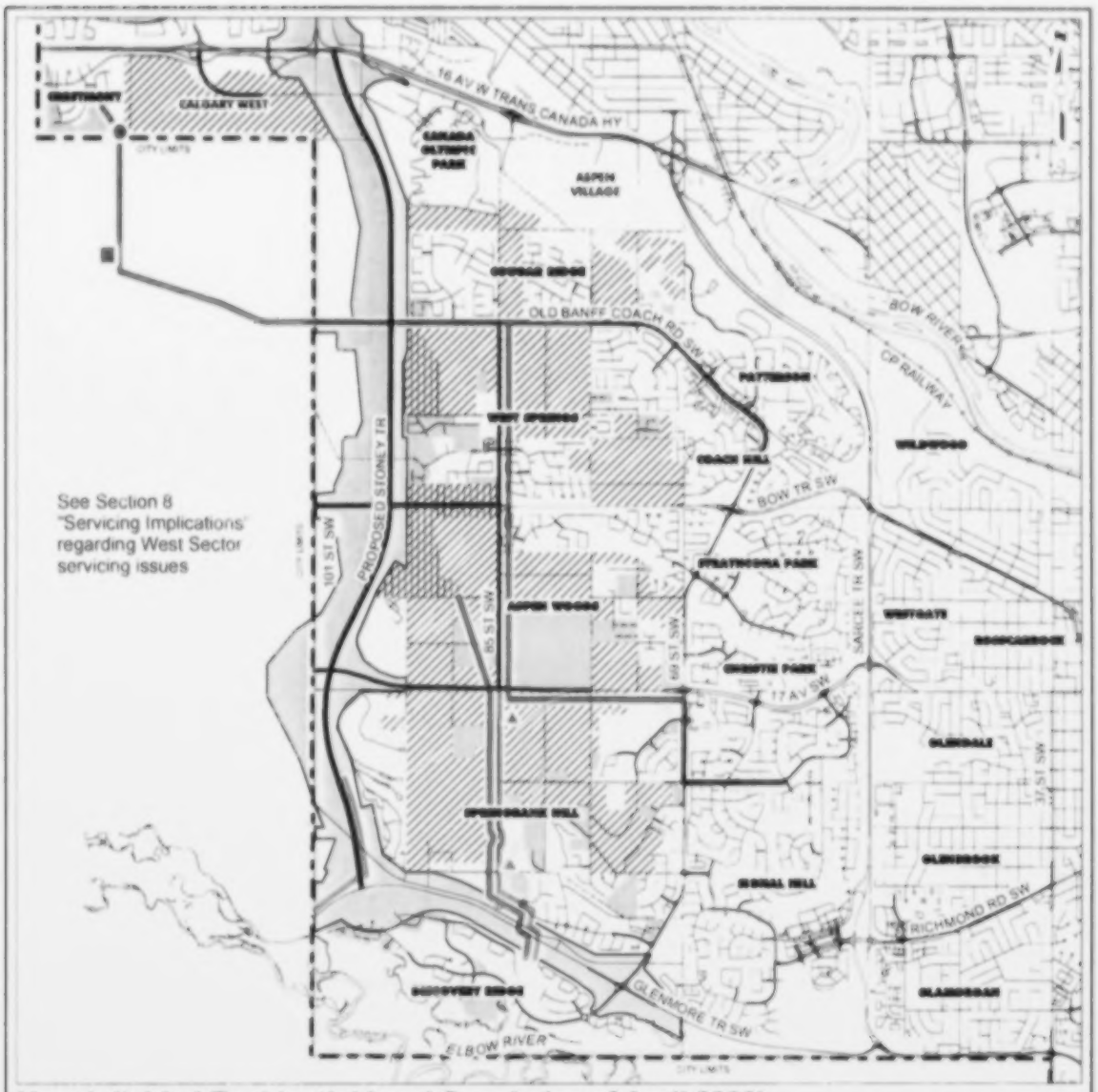


Source: City of Calgary, Planning, Development & Assessment

Figure 24 West Sector, Population Capacity of Developing Communities



Source: City of Calgary, Planning, Development & Assessment



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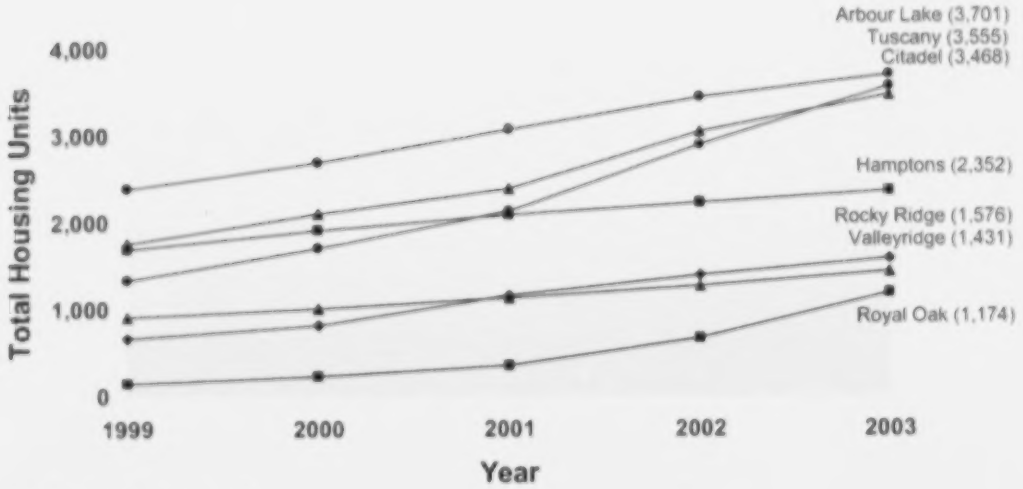
0 1,000 2,000
Meters

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

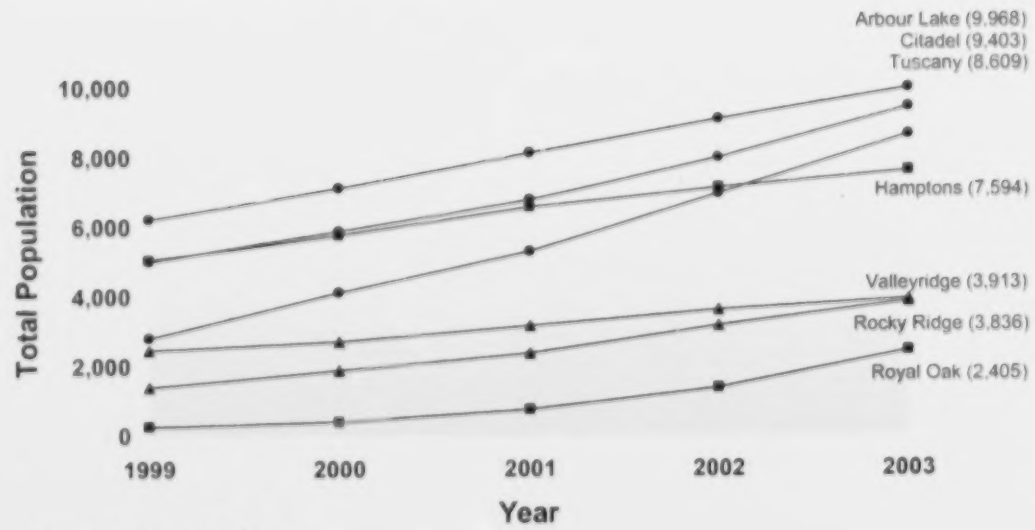
WEST SECTOR
MAP 6

Figure 25 Northwest Sector, Recent Growth in Housing



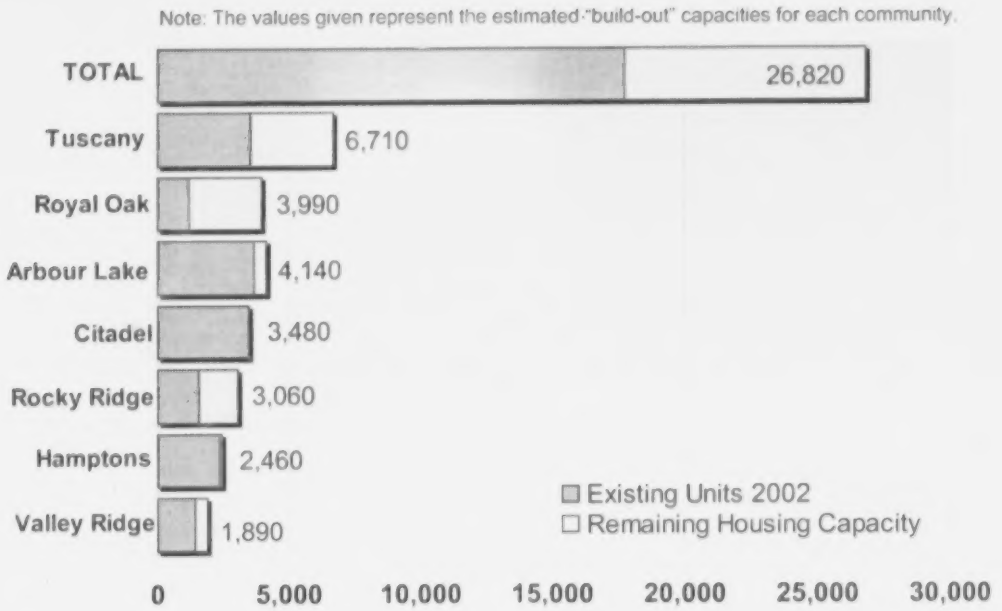
Source: City of Calgary, Civic Census

Figure 26 Northwest Sector, Recent Growth in Population



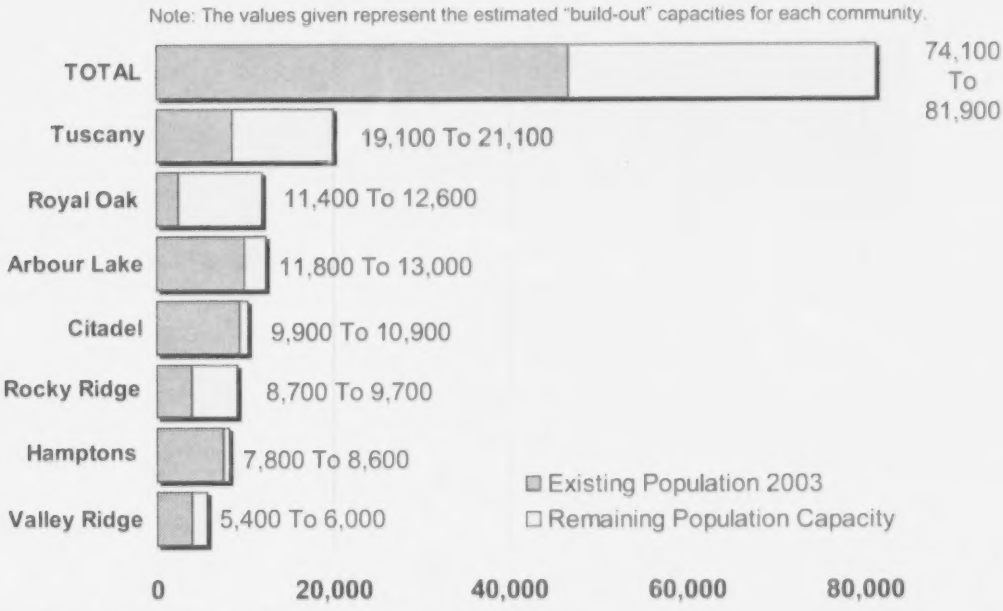
Source: City of Calgary, Civic Census

Figure 27 Northwest Sector, Housing Capacity of Developing Communities



Source: City of Calgary, Planning, Development & Assessment

Figure 28 Northwest Sector, Population Capacity of Developing Communities



Source: City of Calgary, Planning, Development & Assessment

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0 1,000 2,000 3,000
Meters

THE CITY OF CALGARY

Suburban Residential Growth
Information Update 2004-2008

NORTHWEST SECTOR
MAP 7

APPENDIX III: DEVELOPMENT INDUSTRY COMMENTS

URBAN DEVELOPMENT INSTITUTE - CALGARY
SUITE 265 999 - 8th STREET S.W. CALGARY, ALBERTA T2R 1J5
PHONE (403) 531 6250 FAX (403) 531 6252 E MAIL info@udicalgary.com WEBSITE www.udicalgary.com

July 26, 2004

Mr. Decker Shields
Planning and Transportation Policy
Land Use and Mobility, Location #8108
City of Calgary
P.O. Box 2100, Station M
Calgary AB, T2P 2M5

Dear Decker:

RE: Suburban Residential Growth - Information Update 2004-2008

Thank you for the opportunity to review and provide input into the Suburban Residential Growth: Information Update 2004-2008.

As mentioned throughout our discussions on all "growth trend" issues, our main concern has centred over the inaccuracy of the long term forecasts. This concern, however, will be addressed more thoroughly in our review of the "Accommodating Growth: A Framework for Coordinating Municipal Capital Investment" document.

As you are aware, we feel the forecasts and market share allocations found within Suburban Residential Growth: Information Update 2004-2008 are acceptable, based on April 2003 data. As you have advised, changes to census data availability will enable the draft of this report to be available for review earlier next year. UDI-Calgary is pleased to begin working with you as soon as possible to ensure the theoretical projections contained in this document closely match what our industry is observing.

Specific to this year's document, we are pleased that you have revised the purpose section to reflect, more clearly, the overall intent of this document. We are concerned that this document is becoming a foundation for planning decisions on specific applications and are comfortable that some wording has been added to Chapter 2 to guide subsequent application.

Further, we are satisfied that the information found on page 11, within the Sample Density Calculation Chart, has been amended to read: *"Slopes which may be part of the Environmental Reserve are determined not to be developable only if they are considered geo-technically unstable"*. We are also acknowledge that you have amended page A-32, Map 8 to include one additional development location dot in Copperfield, another in Tuscany, and three in Evanston.

..2

The mission of the Urban Development Institute - Calgary is "to represent the development industry in sustainable growth through partnerships and relationships with all stakeholders."

Mr. Decker Shields
July 26, 2004
Page 2

We consider the blue blocks indicating areas forecasted for new growth, found on Map 9, page A-35, too specific but believe that including wording that specifically addresses the communities of Copperfield and Evanston is helpful.

We appreciate your effort to work with our organization and we acknowledge the time and resources necessary in the creation of this document. Thank you for giving us the opportunity to respond and participate in this review. We trust our comments will only strengthen the legitimacy of this document and improve the information provided therein. We are pleased to offer our support for the document.

Best regards,

Judy A. Ferguson
President

cc: Roberto Binda, Chair, UDI-Calgary Planning Committee
UDI-Calgary Board of Directors

The mission of the Urban Development Institute - Calgary is "to represent the development industry in sustainable growth through partnerships and relationships with all stakeholders."

CALGARY REGION
HOME BUILDERS
ASSOCIATION
Building Together

July 21, 2004

Mr Decker Shields
Planning Specialist
Planning Development and Assessment
Land Use Policy #8117
The City of Calgary
P O Box 2100
Postal Station M
Calgary, Alberta
T2P 2M5

Dear Mr Shields

Re: **Suburban Residential Growth - Information Update 2004 - 2008**

Thank you for the opportunity to review the Suburban Residential Growth - Information Update 2004 - 2008.

The CRHBA is pleased to offer its support of this document, and appreciates the opportunity to participate in the review and update of this annual process.

Sincerely

Donna K Moore
Executive Officer

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P 403 235 1911 F 403 248 1272 100, 7326 10th Street NE Calgary AB T2E 8W1 www.crhba.com mail@crhba.com